The Meaningful Engagement Handbook

A guide for understanding, implementing, and measuring lived experience leadership across the spectrum of engagement

Written by:
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About the Authors

Chris Ash and Sophie Otiende are the Co-Founders of Collective Threads Initiative. The work that generated the first edition of this handbook was their first major collaboration.

Chris Ash is an anti-violence advocate and educator whose movement-organising work began in 1994 as a suicide hotline counsellor and LGBTQ activist/organiser. They served as Chair of the U.S. Advisory Council on Human Trafficking and previously managed the National Survivor Network (NSN). While at the NSN, Chris partnered on the development of the *Meaningful Engagement of People with Lived Experience* framework and assessment, spearheaded a project drawing on a community accountability lens to foster repair for survivor leaders harmed by their anti-trafficking engagements, co-authored a workbook to support empowered storytelling for social change, and developed educational materials to teach systems-based violence prevention. In addition to their community-based work they served as a federal policy leader, coordinating the first-ever, entirely survivor-developed, all-survivor Capitol Hill briefing for members of Congress. They were a research consultant for the Modern Slavery Policy and Evidence Centre's research into global promising practices for meaningful engagement of people with lived experience and are currently conducting research in partnership with Cast and the University of North Carolina at Chapel Hill about survivors' experiences of sharing their stories publicly.

Chris's current work brings together lived experience and years of direct service and community-based consent and prevention education work, as well as graduate study in social justice, human rights, and gender theory. Outside of movement work, they write prose poetry and creative nonfiction and have performed at both live storytelling events and fire festivals.

Sophie Otiende defines herself as a feminist, teacher and poet. Her work has focused on developing systems and processes for grassroots organisations. The past 11 years she has focused on creating ethical standards for protection of victims of trafficking, developing systems for organisations, and training and development of curriculum on both protection and awareness of human trafficking. She is also passionate about ethical engagement of survivors of trafficking in the movement and ethical storytelling. Sophie has written and conducted research on several toolkits, with a focus on making available knowledge that is practitioner and community based.

Her work has also included advocacy on change in the philanthropy space, where she has encouraged donors to think about flexible funding for movement-led work. Sophie is a 2015 VitalVoices Fellow and the 2020 recipient of the U.S. Trafficking in Persons Report Hero. She has worked as the Regional Operations Manager of Africa for Liberty Shared and served as a member of the Board of Directors and the Chief Executive Officer for the Global Fund to End Modern Slavery (GFEMS). In 2021, Sophie and a group of survivors from Kenya started Azadi Community, a survivor-led and -centred organisation focusing on long term support for survivors of trafficking. In her private time, when she is not writing poetry she is learning about contemporary African art.

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Introduction to the Second Edition

The Meaningful Engagement Toolbox began as a product of collaboration and responding to our own organisations' meaningful engagement efforts. While we did not initially set out to write a handbook *per se*, as we worked together we realised that our collective knowledge and experience needed to be documented and widely shared. When we first envisioned this resource in 2022, we had extensive prior organising and activism experience in grassroots movements. We understand a *movement* to be a "set of people with a shared experience of injustice who organise to build their collective power and leadership."[1] The movements we were part of integrated the leadership of those directly impacted throughout all levels, with involvement across all areas. In these movements, the role of nonprofits and governments was to support and implement elements of the movement's strategy, rather than defining or directing it. We knew that nonprofits were not themselves movements or movement leaders, but (when in right relationship with movements) they can be crucial and impactful partners that support and amplify movement aims. We knew what grassroots movements looked like and what it felt to work in systems that were actually movement-accountable, with nonprofit and government partners that were allies to movements and organisers. It is with this premise that we both entered the work in the anti-trafficking sector.

At that time, we could tell there was an intention to meaningfully engage people with lived experience, but the models we found led to incomplete or unsupported lived experience leadership. The existing guidance we encountered that promoted "survivor leadership" fell short of genuinely increasing movement leadership by impacted people and seemed to be based on a series of confusing and contradictory assumptions about people who have experienced trafficking.

The Meaningful Engagement Toolbox began as a framework for improving meaningful engagement of trafficking survivors for a small number of larger, mainstream anti-trafficking organisations. While the two of us had each been teaching the frameworks contained in it for years – frameworks we had modelled on our own experiences in movement-accountable systems – we did not initially envision that what we were creating would be shared widely. We engaged a handful of partners with a variety of lived experiences (including some who had experienced human trafficking) to help us build out practical examples for each level as well as the barriers and opportunities section. We created a comprehensive assessment that could serve either to evaluate an organisation's progress on meaningful engagement or as a roadmap for an organisation starting (or restarting) from scratch. **It was important to us as practitioners that these frameworks were actionable.**

When we shared our work, the response showed that it strongly resonated with others. People with lived experience of human trafficking and related forms of violence told us that this was the kind of engagement they wanted. Those who had for years felt forced into a model of "survivor

[1] See: https://creaworld.org/wp-content/uploads/2020/12/All-About-Movements_Web.pdf, p. 13.

leadership" that didn't fit said it was a breath of fresh air. Even those who didn't yet feel financially able to step away entirely from the older model of more tokenising engagements (in which their presence was welcomed but not their expertise) thanked us for describing how it could be different. Organisations that had been wanting for years to improve their engagement reached out to let us know how greatly they appreciated the clear explanations, concrete steps, and measurable actions outlined. We regularly heard from professionals in and beyond the anti-trafficking sector that our toolbox completely changed the ways they thought about survivor leadership and even about the ways they understood their role in the movement.

Formally, the framework and some of its tools were integrated in the U.S. Office for Victims of Crime's Survivor Engagement Training and Technical Assistance project, and they were used by the Freedom Fund in its hotspot and survivor leadership work in Africa. They were adopted by the Council of Europe in its Guidelines for policy makers on engaging with victims and survivors of child sexual exploitation and sexual abuse and they have inspired the framing of the Australian Attorney General's approach to meaningful engagement.

Informally, we've heard of the toolbox being used and adapted in a variety of settings, from guiding the work of a homelessness council in the midwestern United States to being translated and adapted for use in a survivor leadership collective in Thailand. This is the beauty of work under a Creative Commons licence – we recognise that you cannot copyright movements and that "open-sourcing the revolution" (as Chris likes to say) means that we all come out stronger and better equipped to organise for our liberation.

The original "toolkit" (as it was called when we launched this initiative) was intended to guide the long-term and ongoing work of improving meaningful engagement – a process that requires commitment and for which improvements can take years. Accordingly, after the first year of implementation we conducted listening sessions with our partners and carefully considered all the feedback we received, not all of which has been positive. Some found our original toolkit overwhelming in its comprehensiveness and thereby were not sure where to start – although in some cases, people found this to be a positive ("y'all have the framework that does not play around"). In others, there was frustration that it is difficult to implement in under-resourced, less-established organisations, or frustration with the lengthy timeline they felt would be needed to implement many of the recommended changes. It is in this spirit that we have made significant changes this second edition, including:

- Incorporating an experience of belonging into the framework as the ultimate measure of meaningful engagement.
- Introducing new concepts with stories and examples and incorporating more scenarios throughout.
- Language and framing that supports use in other, related movements.
- Guidance on how to use and adapt the Meaningful Engagement tools for customised, localised implementation.

- Collective development of additional tools to support varied approaches to implementation (some which will be launched with the publication of this toolbox and some that will be rolled out over the coming year).
- And keeping the main framework as a standalone handbook with assorted tools available in an online hub.

Our Collective Threads Initiative website will remain a collectively sourced, living hub for tools to accompany this work. We encourage you to sign up for updates there to receive notifications about new and improved tools for a variety of regions and organisational needs.

How to use the Meaningful Engagement Toolbox

Think of this toolbox in two broad parts:

- The handbook, which outlines the concepts and general practices behind the work of meaningful engagement, and
- The tools that accompany the handbook.

The third element in how you use the toolbox comprises your own resources: your organisation, your existing collective knowledge, your community, the people you partner with, and the ways you navigate your local political and social climate.

The framework outlined in this handbook might be compared to a handbook on the fundamentals of gardening. How you implement it will depend on your climate and available resources, which will inform the tools that you choose.

For example:

- An organisation might have team leads read the handbook in advance of the next supervisor meeting. At that meeting, they could decide that since they are already working regularly with survivor consultants they should start by delivering only one level of the assessment to their team (the *Ask* level). They could then use the results to develop a prioritised workplan for *Ask* while their communications staff work through the *Inform* level using the assessment tool as a checklist.
- An organisation that has historically had problems retaining staff and consultants with lived experience might choose to have key team members read a section each week and discuss it in a “book club” style, and then collaboratively work through the Readiness Assessment to begin addressing gaps in advance of formal evaluation of readiness.
- An organisation working in a specific regional and cultural context might realise that the questions in the assessments are not quite as relevant in their own context. In these cases, they could remove some questions, keep others, and then adapt others to create a simple survey for use with their programmes. They could then score using the scoring

tools and use the Priority Matrix to determine next steps and inform development of a workplan.

The idea is to think of the toolbox as just that – a collection of tools that can be adapted to your use. Considering our gardening metaphor, sometimes you need a handheld manual aerator and other times you need a heavy-duty rototiller. Sometimes you need a watering can and other times you need a full irrigation system. Sometimes you live in an area where plants thrive and you just need to work with nature, cultivate native plants, and be thoughtful of the ecosystem. And sometimes you can take the tools you have and modify them based on what you learn in the gardening basics manual, creating a perfect, personalised tool that works just right for you.

In its second edition, this handbook has been published separately, with all tools available on our online hub at our website (rather than included in the handbook itself). As you read through it, consider the unique needs, history, geography, and culture of your programming. Some aspects of those will be fixed and out of your control. As Sophie likes to say, we are often working in a "box" that was defined by us, by funders, or by other systems – and we do what we can within those boxes. However, some aspects can still be transformed with a bit of commitment and creativity until we eventually get rid of the box.

Change what you can on a sustainable timeline and advocate for systems-level change for those things you cannot yet change. We can't bring something into the world if we can't dream it first. So dream with us. And dream big.

Introduction reflections

Everyone has "messed up," caused harm, or made mistakes, and *unlearning* is at least as important as *learning*. A big part of *professional development* is a bit of professional *deconstruction* – taking apart the pieces you thought were a standard part of your work, reflecting on them, and then deciding which ones might be best left behind.

Questions for reflection, discussion, or journaling:

1) How will you manage your discomfort around identifying practices you had once found helpful but that may no longer serve your work?
2) Nobody will ever want to admit there are things they can improve if there is only punishment for having done things in a less-than-ideal way. The poet Maya Angelou is quoted as saying, "I did then what I knew how to do. Now that I know better, I do better." How can you give grace to yourself and others for unlearning and relearning? How can you foster a space where mistakes can lead to meaningful change?

Meaningful Engagement of People with Lived Experience

My dream movement would honour a healthy movement ecosystem, including the roles that aren't as visible or that are unpaid.
- Collective Threads Initiative Co-Creation Partners[2]

Some definitions that guide our work and understanding of "people with lived experience"

Throughout this workbook we will use **impacted communities** and **impacted people** interchangeably to include:

People who have lived experience of an issue
This means someone who has personally experienced an issue, such as someone who has been homeless, experienced racism, or been sexually abused. People who advocate from their lived experience also likely have built up *learned experience* - such as healthcare qualifications, skills learned from professional development, and knowledge gleaned from community organising. Thus, in some groups, people who have lived experience of the same issues will also have different learned experience from each other. Sometimes people with lived experience refer to themselves as survivors, but this language has often been prescriptive within criminal legal systems or non-governmental organisations focused on crime victims. **Remember: the label "survivor" doesn't always work for everyone.**

People who are indirectly impacted by an issue, such as through a loved one
For example, someone may be impacted by the sexual assault of their partner or child. In the anti-sexual violence and anti-domestic violence fields, these people are often called "secondary survivors" to honour their unique and impactful survivorship, and to recognise that these proximal witnesses are carriers of secondary harm, as their lives and wellbeing are impacted in significant ways. Many programmes provide intentional, caring services to carriers of secondary harm such as support groups, and it is not unusual for proximal witnesses (such as parents, partners, roommates, and other close friends or family) to call hotlines to process their experiences. Proximal witnesses need unique support, but should not dictate the supports or solutions that are or aren't available to primary survivors, who experienced the abuse directly.

Communities that have a significant statistical likelihood of experiencing an issue.
Because of disproportionate rates of incarceration, Indigenous and Black communities in the United States are impacted communities who have a direct stake in addressing mass

[2] In preparation for our 2025 revision, we held a series of listening sessions. At each, we asked our partners, "What would your dream movement(s) to end violence look like?" Throughout this publication, you'll see some of their responses.

incarceration and policing. Migrant farmworkers and domestic workers are impacted communities for human trafficking. Indigenous populations worldwide are impacted communities for ongoing colonial violence, as well as the legacies of trauma from past iterations of such. Greater statistical risk is often created by external policies and systems, but it still means that impacted communities will have higher numbers of people with primary and secondary experience of the issue.

People and communities who are impacted by efforts to address an issue. When interventions are developed and implemented in a vacuum, systems may fail to realise how those interventions may themselves cause harm to other communities. Communities impacted by efforts should be included in meaningful engagement efforts.

What is a movement?

A movement is a "set of people with a shared experience of injustice who organise to build their collective power and leadership."[3] Often, as movements start to gain traction in society, a sector may develop to integrate its work into systems. A sector is thus the collection of governmental and non-governmental institutions that are funded to address the issue.

While there is plenty of overlap between the work of movements and the work of sectors, we can think of the following characteristics as typical of each:[4]

With regard to a shared experience of injustice: In a movement, the people leading and organising in movements are directly impacted by the issue. In a sector, the people leading and developing strategy in the sector may or may not be directly impacted by the issue.

With regard to "organising to build collective power": A movement's purpose is to organise, which means to build relationships to shift the balance of power in a strategic way, "informed by a larger social change agenda." Collective power does not mean that the number of individuals who have power in a hierarchical model increases; rather, it means that the hierarchical models, in which some people have decision-making power and others do not, become less relevant as power is shared among and flows in relationships with communities. A sector's purpose is to develop and administer policies, programmes, research, and services. When sector participants do challenge the balance of power, they may experience pushback or risk losing funding because the systems that engender, supervise, or support those participants may be deeply intertwined with those that create and reinforce hierarchy.

With regard to a "collection of institutions": Movements can have a variety of structures, including individual organisers without affiliation, mutual aid support networks, unregistered grassroots collectives, registered organisations, and volunteers who support the cause

[3] Batliwala, S. (2020). *All about Movements: Why Building Movements Creates Deeper Change*. New Delhi: CREA.

[4] See Annex 2: Movements and Sectors for a list of FAQs about the interrelated roles of movements and sectors.

peripherally. Sectors are comprised of government agencies (local, regional, national), non-governmental organisations, and other registered entities. Individuals engaged in the sector include leaders, employees, civil servants, volunteers, and individual consultants or speakers who focus on sector engagement.

With regard to funding: Resources for the unfunded grassroots parts of the movement are often crowdsourced and community-based. Community members or organisers with specific skills may step up to provide labour, lessening the need for funding. Funding may be generated by the community itself or from friends and allies. Governments fund the work of government agencies as well as a significant amount of the work done by NGOs and individuals. The remainder of funding for the sector generally comes from individual, corporate, or foundation philanthropy. Funding in a sector response is always aligned with the administration's or funder's priorities, which can always change or force siloed responses. This means that work may be compromised based on the funder.

It's important to remember that these are not two entirely separate groups of individuals and structures. Some people and organisations can be part of both the movement and the sector, parts of the movement may exist entirely apart from the sector, and those in the sector are not inherently part of the movement by virtue of being in the sector. These "overlap" groups include the registered or incorporated and externally-funded structures addressing an issue that are led by people with a shared experience of injustice or in deep relationship with grassroots movements. It includes individuals working in the sector who are also part of the broader movement outside of their sector work. And remember, there can still be problematic power dynamics even within the overlap.

This distinction between movements and sectors shows up in the history of meaningful engagement of impacted people across movements.

Meaningful engagement means ensuring that people who are or have been impacted by an issue are essential partners in developing, implementing, and evaluating the effectiveness of strategies to address the issue.[5] While there are many ways to measure whether engagement is meaningful, **the ultimate test of "meaningfulness" is whether or not the participants feel a sense of belonging in the process.**

On an individual level, this approach requires professionals in the field (including those with lived experience) to decentre their own identities and experiences in order to allow the self-determination of the impacted individual engaging in services or advocacy. On an organisational or movement level, this approach requires professionals in the field who do not have lived experience to decentre themselves to make space for genuine movement

[5] Note that for prevention work in particular, people who are likely to be impacted are essential partners, as well. These include, for example, worker organisers, immigrant rights advocates, and partners who may experience unintended or harmful impacts as a result of the intervention.

leadership by people with lived experience, and people with lived experience in the field to always advocate for policies that provide benefit for the greatest number and variety of impacted individuals.

Meaningful engagement of people with lived experience of violence begins at the moment you realise someone might be experiencing violence.[6] Someone with lived experience doesn't need to be at any particular stage in their healing to have wisdom and insight about their experiences that you may not have. Without inviting that person to take on any kind of formal leadership position, you can honour their wisdom and feedback by asking: *What do you need right now? What would help you feel safer or supported? How can I support you in removing some of the barriers to safety or support?* These questions enhance (rather than minimise) the person's agency.

From that initial point of contact, anti-violence and social justice organisations can set the tone for respectful relationships with impacted people that foster their self-determination and security while recognising that ultimately **people with lived experience are the experts in their own experiences**.

A brief history of meaningful engagement

In many sectors and in some parts of the world, the people who have historically been sector leaders come from impacted communities or have lived experience.

For example:

- People who have been domestic workers or migrant workers lead organisations that fight for worker rights. The founder of the Global Migrant Workers Network has lived experience as a migrant worker, and most (if not all) members of its leadership team have been migrant workers as well.
- People who are survivors of sexual assault become directors of rape crisis centres. The first appointed Director of the newly formed U.S. Office on Violence Against Women was a domestic violence attorney and policymaker as well as a survivor of stalking, and many rape crisis centres started out as second phone lines in survivor-activist's homes.
- People who have experience as child labourers or child brides form organisations that fight to improve conditions for children.

[6] Ash, C. (2022). *Survivor engagement in international policy and programming in human trafficking and modern slavery: North America*. Modern Slavery Policy and Evidence Centre. See: https://files.modernslaverypec.org/production/assets/downloads/Engagement-lived-experience-north-america.pdf?dm=1736268032.

- People who have lived experience of racism become civil rights attorneys or start anti-racism nonprofits.
- MMIR (Murdered and Missing Indigenous Relatives) survivors or loved ones often start citizen task forces to help locate other missing Indigenous people and to fight for justice for those who did not survive.
- People with disabilities form advocacy organisations that challenge negative stereotypes and rally for political and institutional change.
- People who grew up without enough food apply to become caseworkers in government social services nonprofits.

Not all sectors began as movement-led. For example, it took 11 years after the founding of the NAACP in the U.S. to have its first African American executive secretary, and 23 years for the U.S. Commission on Civil Rights to have its first African American chairperson.[7] Globally, well-funded peacebuilding efforts in conflict zones in the Global South have been established by Global North organisations, even as local efforts remain poorly-funded.

Some efforts to engage impacted people have taken the form of advisory councils, consultants, or opportunities for individuals to share their personal experiences in order to inform policy or programming. Many people engaged in this way report feeling excited about the opportunity to participate and to be valued as experts, and to feel like their input was well-received. However, many other people with lived experience have reported that participation in advisory or storytelling capacities felt like a *replacement for* meaningful engagement rather than a part of it. Sometimes, people with lived experience are pressured by organisations and individual advocates to share details of their personal story, which they may not be comfortable disclosing to public audiences, colleagues, or even close friends. Impacted people sometimes report feeling tokenised, that they weren't given the information they needed to provide useful guidance, that the guidance they did provide was not heard or incorporated, or that they were being exploited for the appearance of "lived experience engagement" or expected to parrot the organisation's talking points.

This suggests that some approaches to engagement of people with lived experience, when done in isolation or in part, may reinforce rather than challenge biases that advocates may hold about people with lived experience.

Organisation leaders may have biases that lead to tokenising engagements, such as:

- That people with lived experience need or can be expected to tell their stories to be lived experience leaders.
- That increasing lived experience leadership is simply about having representation in the movement.

[7] The first African American chair of the commission was a politically conservative appointee who opposed affirmative action and other Civil Rights Era reforms, highlighting how impacted people are often selected for positions based on how likely they are to support (or challenge) existing structures.

- That people with lived experience do not have (or struggle to learn) skills to do other kinds of movement leadership or are too unhealed for other types of work.

Or they may have other biases that lead them to misunderstand or undervalue the nature or purpose of lived experience engagement, such as:

- That there are enough people with lived experience working in the movement now and we have arrived at equity.
- That having people who work with impacted populations in the room is as good as having people with lived experience.
- That we are now in a place where we no longer need people with lived experience in our work.

Taken together, these biases and assumptions lead to engagement that is tokenising, limiting, or ineffective. The alternative is to ensure that people with lived experience are *engaged meaningfully* throughout all aspects of the work.

Values that inform meaningful engagement of impacted people

- **Self-defined:** People with lived experience deserve to define safety and leadership for themselves and have support in achieving their goals, whether as a beneficiary of services, nonprofit professional, or movement organiser – or sometimes all three! They deserve to be able to name what would be helpful for them and what would not.
- **Trauma-informed:** People with lived experience deserve transparency about how the feedback and expertise they provide will be used, as well as how decisions are made that impact them. Trauma-informed means that movement-adjacent organisations are trustworthy, transparent, collaborative, and respectful of the impacts of cultural and historical trauma.
- **Dignity**: People with lived experience deserve to be treated with respect and dignity. This includes avoiding stereotyping and bias in service provision as well as avoiding tokenism, condescension, or paternalism in leadership opportunities and development.
- **Equality and equity:** People with lived experience are essential leaders and equal collaborators in the movements to end the issues that impact them. In any region, some voices, identities, and perspectives are given more power than others to influence decisions and funding. We must counteract those imbalances in how we do our work.[8]
- **Belonging:** A movement is only a movement if it is the people with the shared experience of injustice who are organising and leading to bring about change, supported by their communities, neighbours, and partners. A thriving movement is designed by and for impacted people to centre their needs and fosters a space where everyone (with or without lived experience) can feel a deep sense of belonging.

[8] One example of this from within anti-trafficking work: In some settings, survivors of non-sexual exploitation may be considered more “palatable” and have more access to certain kinds of power. In other settings, survivors of sexual violence may be prioritised in opportunities for voice and engagement. In still others, survivors who don’t challenge existing economic or policy structures will be prioritised.

This handbook was initially written to provide guidance to anti-trafficking organisations and agencies hoping to improve the quality of their lived experience engagement, due to the unique history and dynamics of tokenisation in the sector. The primary co-authors of and contributors to this handbook bring our lived, learned, and professional experience into its framing. Our collective lived experiences (in addition to human trafficking) include sexual abuse and assault, domestic violence, racism and anti-Blackness, colonial violence, homophobia and transphobia, homelessness, classism, child abuse, childhood bullying, depression and suicide, chronic illness, and more. We have written (and revised) this handbook with a broad lens in the hopes that it can provide a structure for lived experience engagement across a variety of experiences in a variety of movements and settings.

Meaningful engagement reflections

The idea that the movement addressing an issue and its associated sector are not the same may be new for many readers. And yet, people working in the sector are often frustrated by the limitations of systems. During our listening sessions, we opened one of our meetings by asking our standard question: “What would your dream movement(s) to end violence and oppression look like?” One of our partners who works in a federal government responded: “I imagine that movement, but I also imagine the systems it could create.” Imagining a movement means re-imagining systems.

Questions for reflection, discussion, or journaling:

1) The idea that the movement addressing an issue and its associated sector are different may be new for many readers. If you are someone who works primarily in the sector, have you ever been frustrated by limitations due to funding or bureaucracy? Remembering that sometimes the “why” can help stay focused on difficult tasks, what keeps you motivated to stay in this work?
2) When you imagine what a powerful, caring movement driven by impacted people could look like, what systems would support it?

Inclusion, Power-Sharing, and Belonging

My dream movement would not replicate colonial norms with regard to legibility, respect for indigenous ways and knowledge resources, and extractive and exploitative capitalist practices.

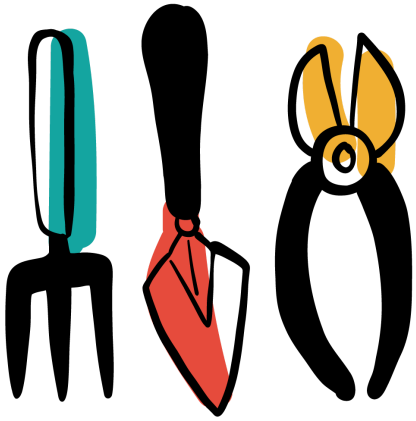
- Collective Threads Initiative Co-Creation Partners

Meaningful engagement of people with lived experience in communities, organisations, and movements can only happen in environments that share power and are truly inclusive. Belonging exists only in these spaces.

All about inclusion

Inclusion is the proactive and continuous practice of creating a context where people are embraced in their full and complex identities, given as much access to engagement as possible, and treated with dignity and respect. Inclusion alone does not create belonging, as inclusion without the necessary shifts in culture often lead to backlash. When not done with a focus on belonging, "inclusion can make members of the 'included' group feel as if they were just guests."[9] We create structural guardrails to assist us in our organisational steps towards belonging, but inclusion grounded in genuine belonging ultimately won't need the guardrails that come with legalistic approaches to inclusion.

At its core, inclusion is about sharing power with the aim of creating an environment in which all of our identities, experiences, and wisdom shape the outcome. But how might these influence how we participate in the workplace? This is something that can impact *all* staff and partners, not just those with lived experience of the issue, and creating inclusive work environments strengthens organisations for *all* the people doing the work.



[9] powell, j. a. & Menendian, S. (2024). *Belonging Without Othering: How We Save Ourselves and the World,* (p. 135). Stanford University Press.

For example:

Dwi, a nonbinary person from a South Asian family who has lived experience of homelessness working in an nongovernmental homelessness organisation and is now college educated might wonder, “If I remind them to encourage clients to share their pronouns, will the other staff act like it’s personal?”

Ben, an American man with lived experience of human trafficking who works for a non-governmental organisation addressing human trafficking in the Global South might wonder: “So they keep talking about violence against women and girls, which is huge and very important. I wish we had ideas in mind for how to support men who have experienced human trafficking.”

Neema, an East African advocate and educator with lived experience of sexual violence but not human trafficking who works at a human trafficking organisation might wonder: “I keep hearing them say they support lived experience-led programming, but they keep asking white, Western people with lived experience what they think. Is there a place for me in this movement?”

Saanvi, a bisexual Indian woman who is a new staff member at a shelter for trafficking survivors, who has lived experience of human trafficking and is not out as LGBTQ, might wonder: “Every time they talk about an LGBTQ participant, I feel even more afraid to tell them who I am. I worry about how they treat LGBTQ participants, but don’t want to draw attention to myself.”

While these are just a few examples of identities, experiences, and fears that your team members may have, they all reflect our attempts to navigate personal, cultural and structural, workplace, and movement-wide power dynamics.

What is our ultimate vision?

Earlier in this handbook, we were reminded that not everyone in the workplace who has lived experience will disclose. However, we recognise how disclosing is currently a core part of how we discuss inclusion. When a workplace fosters a safe work environment for people with lived experience of an issue, people will be more likely to disclose. Also, for many, their lived experience is not something they are interested in sharing in their work, no matter how safe the environment feels. Part of respecting people with lived experience means respecting the right to disclose or not. Therefore, disclosure – despite the fact that it could be a sign of how safe people feel – should not be the ultimate goal. One of the problems of introducing the language of meaningful engagement without an emphasis on belonging is the risk that only people who

disclose survivorship will be included. If we mandate disclosure in order to be included, we may be contributing to tokenism, particularly if there is no alignment in values.

An intersectional lens reminds us that people are more than the sum total of their identities and experiences, which prompts us to ask:

1. **What are the values that guide our work?** If our end goal is equity for all people, then it is not only someone's lived experience that allows their engagement to move us meaningfully in that direction.
2. **What are the values of the people we are engaging (whether or not they have lived experience)?**

Having lived experience of an issue does not automatically mean someone holds specific values around equity and inclusion. Equity is not the same as equality. Equality is about treating everyone the same, while equity requires recognising and addressing systemic imbalances. Many people with lived experience have faced exclusion or gatekeeping, especially from organisations that privilege white Western norms of communication, education or what is considered an acceptable story. However, this does not always mean they have a critical awareness of those dynamics. Experiencing exclusion is not the same as understanding or challenging the structures that cause it. Not all lived experience voices are grounded in a commitment to equity.

While this kind of gatekeeping is always wrong, we can thoughtfully consider who we partner with and who we don't, even when the partnership is entirely among people with lived experience. Black, queer, and feminist activist and author Charlene Carruthers starts her guidance for building effective movement partnerships with two questions: "Who are you?" and "Who are your people?" Considering your values as an advocate or organisation is a key part of understanding who you are will then inform who you will partner with. All of us, whether we have lived experience or not, are required to define our values in a movement and can shape our partnerships around values alignment.

For example, an organisation whose values include a commitment to honouring each person's right to their stories will find itself at odds with a survivor leader who regularly imposes their story onto others or who invalidates someone else's framing of "consent." Even in cases where either value is not "right" or "wrong," misalignment can cause rifts that make inclusion unlikely. For example, an advocate whose values include a commitment to building collective power may find themselves at odds with an advocate whose approach focuses entirely on individual empowerment of impacted people. These are both noble goals, and yet they may not be best aligned for co-organising. ***Remember: Lived experience alone does not create the conditions for working together towards shared goals; shared values do.***

All about power

"Belonging is also found in our relationship with power, and our capacity to participate meaningfully in the decision-making structures of the broader whole. Our agency, the ability to make choices in shaping our circumstances, and our capacity to collectively determine our shared future, are all bound up in this dimension of belonging." - Kim Samuel in On Belonging

What is power?

For the purposes of our conversation, we can think of power as "the ability or capacity to have authority or influence over decisions and outcomes." These decisions and outcomes can be personal (control over your own agency), cultural and structural, or workplace or movement based.

Personal and Relationship	This includes one-on-one relationships we might have with people, including power dynamics between people who are dating, married, living together, or in shared community. They may be power dynamics based on differences in economic security, family or community support, physical size or strength, willingness to use intimidation, or impacts of prior trauma.
Cultural and Structural	This includes how our access to power and safety are influenced by the beliefs and norms of the culture we're in or the way our communities or governments are structured. Many of these power dynamics are class- and identity-based. Cultures, communities, and systems may restrict someone's access to safety and power based on race, ethnicity, immigration status, gender, sexual orientation, gender identity, disability, or on other biases and assumptions.
Workplace	This includes how formal *and informal* power dynamics show up in our organisations, workplaces, and collaborations based on funding, job descriptions, organisational roles, seniority and longevity. For example, CEOs hold more power decision-making power than programme managers, and programme managers have more decision-making power than advisory councils or contractors.
Movement	Within the anti-trafficking, anti-violence, and international development sectors, different organisations hold different kinds of power. People in different roles also hold different kinds of power. Even among impacted people working in the movement, some may have more formal *or informal* power than others.

When we talk about power, the discussion can feel abstract because most of the time we do not explicitly acknowledge or analyse the ways in which power is acquired, exercised, and asserted. It is also important to note that the understanding of power can be quite subjective and can take on different meanings depending on the context of the power dynamics.

Someone might have little power in one space but immense power in another, and our identities as "privileged" or "marginalised" may change depending upon the context. For example, someone might be deeply marginalised in their society due to their identities but also have great power within their issue's sector due to their name recognition and respect for their advocacy. Someone could have very little power in an unhealthy relationship with a partner but also have workplace power due to having a managerial role. Someone may have very little institutional or community power but be seen as a role model within the movements where they work. When we have been on the receiving end of harmful power dynamics in some areas of our lives, it's important to recognise that we may still be at risk of *enacting* harmful power dynamics on others in different spaces or at different times.

Social power is the capacity of different individuals or groups to determine who gets what, who does what, who decides what, and who sets the agenda.[10] This is also true in movements and sectors:

1. Who gets what?
Obviously, power dynamics can influence who gets access to resources. It also influences other things that are less tangible but equally real and significant. For example, who gets to self-identify whether or not they have lived experience of the organisation's issue? How does that disclosure impact their experiences in the sector? Who gets to be respected and to have their dignity and privacy honoured? ***Remember: This is not just about resources but is also about fundamental rights and privileges that are sometimes quite subtle, particularly to those who benefit from this kind of power.***

2. Who does what?
A solid power analysis will explore what is defined as valuable work and also explore how essential labour is distributed. ***Consider: What skills are valued in our sector?*** This often shows up in what we consider to be "unskilled work," when in reality the work simply requires a different set of equally competent skills. Who gets hired and into what kinds of positions? What kinds of labour are seen as "productive" and how is work time structured around "productivity"? What kinds of expertise do we value more or less and who gets to be seen as an "expert"? What kind of knowledge is seen as "objective" and where and by whom do we believe knowledge is created? And what assumptions do we hold about which people are capable of learning or doing which things?

3. Who decides what?
Power is not shared when decisions about funding and ethical development practices are not shared. Who are the donors and how are decisions made about what kinds of donors and funding will be pursued? Who receives funding and gets approved for grants? What barriers

[10] Batliwala, S. (April 2019). *All About Power: Understanding Social Power & Power Structures, New Delhi, CREA. Available at: https://reconference.creaworld.org/all-about-power/*.

exist that make it difficult for grassroots and/or lived experience-led organisations to receive and maintain funding?

4. Who sets the agenda?
Often people from impacted communities are invited into a project after the workplan or agenda is already developed. What does it look like in practice to co-create the agenda as part of the work process? How can we keep the agenda responsive and flexible while honouring timelines and accountability to our intentions?

> When dealing with power in an organisation, movement, or any social place, it is important to not only look at the obvious ways that power operates but also look at the *invisible* ways in which it moves and is asserted. By looking at the invisible ways that power operates, it is possible to promote belonging at work without making marginalised people feel like we are doing them a favour by addressing the fundamental issues of equity and inclusion at work.

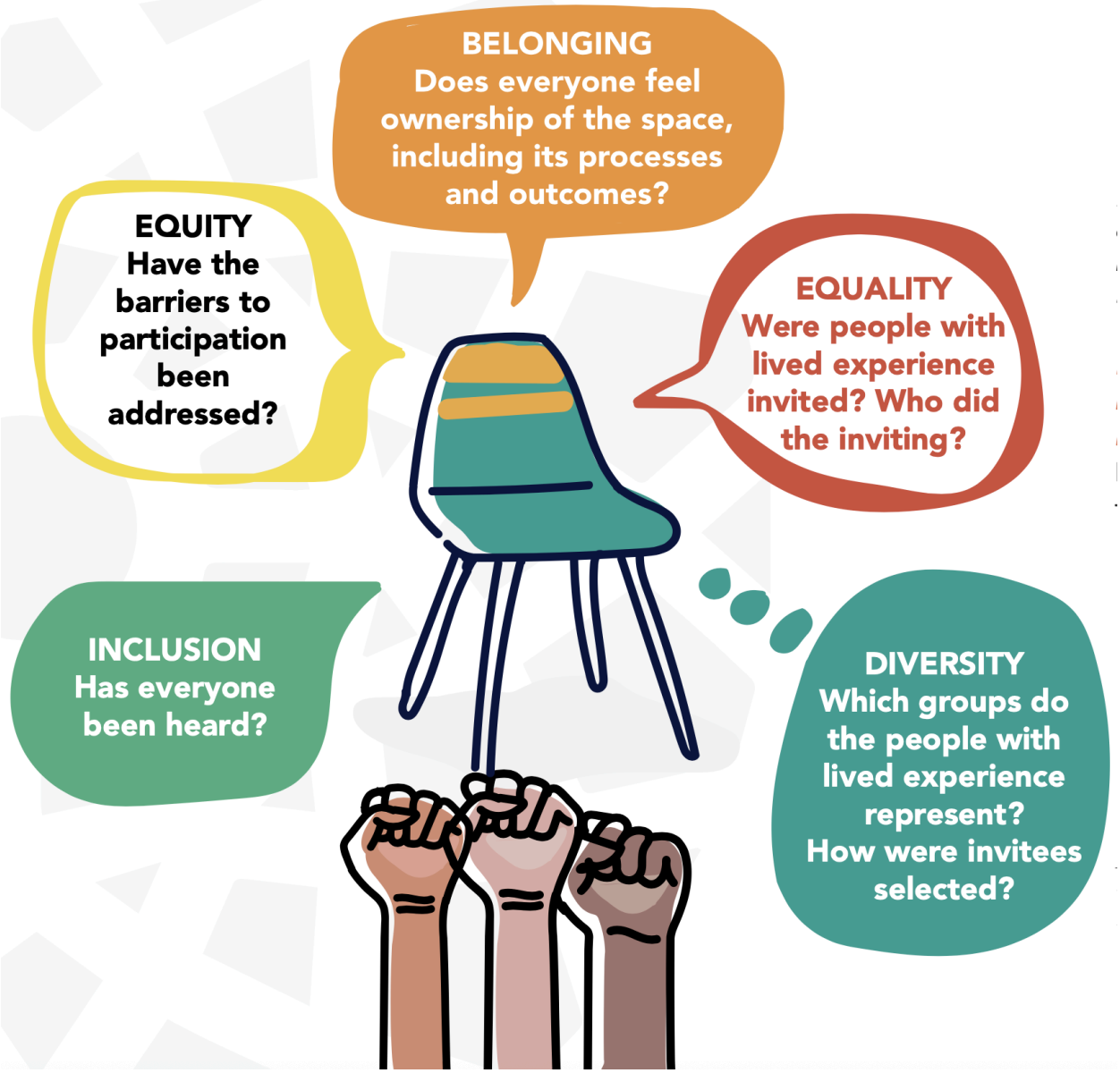
Remember: People's experiences of power dynamics are intersectional.[11] This doesn't mean that each of their identities either adds or subtracts a point from how much power they have. **Intersectionality means that the combination of certain kinds of identities or experiences creates an entirely different form of power dynamic.** For example, a Black woman doesn't just experience racism plus gender discrimination – she experiences specific kinds of gender discrimination due to being Black, and specific kinds of racism due to being a woman. Similarly, impacted people who hold other marginalised identities will experience unique kinds of power dynamics in the workplace and not all people with lived experience have the same experiences of exclusion or inclusion.[12]

Meaningful inclusion

It is impossible to talk about inclusion in any context without thinking about power dynamics and how they impact cultural, workplace, and movement-wide decision-making as well as personal agency. People have many identities and experiences, and they navigate multiple contexts and communities. Power looks and operates very differently in different contexts. As mentioned earlier, one person with lived experience might have more power in some spaces in their lives and less in others. Organisations and advocates must be conscious of how power dynamics impact how teams work together.

[11] This term was coined by American legal scholar Kimberlé Crenshaw.
[12] If this framing of intersectionality is new to you, consider reading this simple essay by Mary Maxfield that highlights how intersectionality is not just adding one identity to the other: https://static1.squarespace.com/static/5f5fc42975217a7b7a1a1fcc/t/610818ca7be7e81df0e0d567/1627920586282/On+Intersectionality.pdf.

Inclusion doesn't just mean having representation from diverse identities, including people with lived experience, in the room. You can create a diverse team, but if their insights are not part of shaping the values, processes, and programmes that were created without their participation – if they do not truly share in the decision-making power – then it is not sincere and equitable inclusion. Our values around lived experience engagement cannot be performative – they must be honoured even when impacted people are not in the room and even when we are not working specifically on meaningful engagement. For organisations that have not always operated with a high level of inclusion, organisational readiness work can build a better foundation for meaningful inclusion and engagement.



In *Belonging Without Othering: How We Save Ourselves and the World*, Stephen Menendian and john a. powell outline what they consider to be the necessary ingredients required for belonging:

1) Inclusion and equity.
2) A *sense* of connection.
3) Visibility or recognition, and opportunities to be *seen.*
4) Agency – having the individual and collective "power to act and the potential to influence," which goes "beyond the classic formulation of 'voice.'"[13]

How do these requirements resonate with the work your organisation or agency has been doing on meaningful engagement? What have you been doing well? What are some potential areas for improvement?

Remember: "true belonging must touch and transform non-othered peoples as well as othered peoples; it must be universal rather than targeted."[14] Focusing only on "more people with lived experience" fails to transform the very spaces in which we do our liberation work.

Inclusion reflections

Inclusion can be complicated when we focus on it without acknowledging shared values. Even among impacted people, the values may not always be aligned. Some people want to do the work to focus on their specific issue or form of the issue but may not be interested in supporting the full issue of the organisation. For example, someone with lived experience of anti-immigrant discrimination on a skilled tech worker visa may be interested in addressing anti-immigrant discrimination from the perspective of their own experience, but may be less committed to advocating for agricultural or domestic workers facing visa discrimination.

Questions for reflection, discussion, or journaling:

1) What are the values you feel are most important in the work to address your issue? Do you feel like these values are shared by your partners in the work? Why or why not? And how does that impact your work?
2) Sometimes concepts like "values alignment," "required skills, knowledge, and experience," and "organisational culture fit" get used to gatekeep in ways that exclude impacted people or leave them feeling like outsiders in the sector. What are some practices you use (or will use) to clarify for yourself when you are making decisions based on alignment and when you are making decisions based on resistance to change?

[13] powell & Menendian (2024), pp. 141-142.
[14] powell & Menendian (2024), p. 179.

Belonging: The Ultimate Indicator of Meaningful Engagement

My dream movement would prioritise care and beloved community.
- Collective Threads Initiative Co-Creation Partners

"I haven't always had a safe home, but now my home is my safe place where I know I belong. When I'm sitting in my own home, my feeling of belonging is so deep and inherent that I don't even think about it. I wear what I feel good in. I don't worry about being judged. I don't choose my words as anxiously, because I know my thoughts will be received with the spirit of curiosity and love they were intended. I have art, food, and furniture that feel cozy to me, and I know that if I need something to change I can talk to my family members and figure out a solution that works for all of us."
– CTI Partner

What is belonging?

Belonging is a deep knowing and experience of being at home – in your body and in your social and physical environment. Belonging gives you the foundation to be able to thrive. Belonging happens only when there is co-creation and co-ownership. It is both a practice and a feeling: an ongoing practice of collaborative creation that results in a feeling of being seen, welcomed, and at ease.

An ongoing practice of collaborative creation	**A feeling of being seen, welcomed, and at ease**
• Brainstorming, planning, implementation, and evaluation are collaborative processes. • The agenda is co-created rather than handed down. • Collective wellbeing is prioritised and power is shared.	• People know they can be themselves without having to pretend in order to fit in. • People know their contributions to the space are valued. • People know others in the space care for them and prioritise everyone's wellbeing.

Belonging goes well beyond survival. People who know they belong in a space no longer have to fight to be heard – they can soften into the experience of beauty and joy. They can spend less time defending against the challenges of the present and spend more time dreaming about a future that has ease – a future they can bring into existence only by first being able to dream of it.

Strong and healthy movements prioritise the growth of impacted people in ways that might not even be accessible to them yet in their broader societies. Healthy movements practise, in the now, the ideals they are working towards.

1. **True belonging is fundamentally about co-creation and co-ownership**

True belonging in an organisation or institution happens when everyone, including those most impacted by an issue, feel at home in the space and experience a sense of collective ownership over its continual co-creation, treatment of all people, and outcomes. It isn't created solely by bringing in more people with lived experience.

Co-creation and co-ownership mean that everyone has a say and owns the processes, systems, and projects that we work on. It leverages the perspectives of everyone on the team and ensures that everyone has a stake in the work that we do.

2. **True belonging is a practical sense of being at home**

Belonging is sensed in the body, in a feeling of being at home in a space. That feeling does not *just happen*. It is made possible and supported by practical, logistical realities that may include:

- Unconventional approaches to leadership.
- The recognition that leadership has seasons (including seasons when you step aside for others to take the helm).
- A willingness to receive feedback.
- Prioritising relationships and compassionate conflict resolution.
- A commitment to protect the safety of the human rights defenders in the impacted communities you partner with even under political pressures.

There is no one recipe – not because there aren't effective strategies, but because that what is needed in your particular organisation can only emerge from and create the space for meaningful engagement if it is co-created with your partners.

3. **True belonging is more than inclusion**

True belonging can foster deep engagement and cultural transformation. When people lack spaces where they feel belonging, they are vulnerable to exploitation. This is true in cases where socially-isolated individuals are targeted for abuse or exploitation by people promising belonging. It is also true in cases where individuals are targeted for recruitment into extremist, politically- or religiously-radical groups through the promise of belonging. This latter example is what Kim Samuel refers to as the "shadow side of belonging" – the creation of a "sense of in-group loyalty that enables violence," which may initially feel and look like belonging but which is hollow, unfulfilling, and can lead to further abuse.[15] This shadow side of belonging is often part

[15] Samuel, K. (2022). *On Belonging* (pp. 42-44) New York, Abrams Press.

of the abusive and exploitative grooming process targeted at individuals and the sense of false belonging often makes it difficult to see the abuse for what it is.

This kind of false or one-sided belonging can be, at a minimum, disappointing. On a massive and unrestrained scale, it can foster oppression, fascism, and genocide. In 2024, Stephen Menendian and john powell explored what it can look like to foster the necessary human drive for belonging without creating "less-than" out-groups in *Belonging Without Othering: How We Save Ourselves and the World.* In this book, they offer a framework for levels of inclusion. Their inclusion framework is somewhat different from our lived experience framework but provides helpful insights into how people experience "belonging." Note that their first level of inclusion is how many impacted people experience organisational spaces, and yet it is the beginning (not the end goal) of inclusion.

Menendian and powell's framework for inclusion, paraphrased:[16]

1) People feel like guests who have been invited to someone else's table. The primary barrier to entry has been removed and admission is formally extended.
2) Organisations may then go beyond "opening the door" to proactively pursuing meaningful representation – representation large enough that the group doesn't feel "isolated or tokenised."
3) The next step is when organisations intentionally allocate greater resources to members of formerly excluded groups or higher-needs populations. Many organisations might think of this as using an "equity lens."
4) **Inclusion is when space is made in the institution for members of the formerly excluded group and there is a conscious effort to ensure that it is experienced on an equitable basis. This becomes *belonging* when the "members of the group are made to feel as if they belong in the institution and when they have a say in the organisation, design, construction, *or reconstruction* of that institution."** Belonging is about building a bigger "we" and it demands more of the institution, individuals, and groups involved (up to and including reconstruction) than with other forms of equity or inclusion.

Inclusion emphasises practical strategies to get people with lived experience into the room equitably. Belonging emphasises ensuring they feel welcome, at home, and like co-owners of the space once they are there.

"I think home is when you are yourself, when you do not need to pretend, when you do not need to put on a poker face. Home is where you fight for your future. Home is where you dream."
- Kim Samuel in On Belonging

4. True belonging means all of us belong

In a healthy movement, everyone feels belonging. The movement centres people with lived experience and is about collective power – and that means that everyone should belong. While

[16] powell & Menendian (2024), pp. 135-138.

the movement is “people with a shared experience of injustice” who organise for their collective power, our understanding of belonging without othering frames that power as “power with” rather than “power over.” While rigid distinctions of “survivor” vs “ally” may help us understand who is currently included or excluded from institutional decision-making and leadership, they don’t serve us well when building a cohesive movement. An intersectional understanding of lived experience reminds us that we bring all our lived experiences into the room with us. In gender-based violence spaces, for example, “survivors” and “allies” alike may bring their intersectional experiences of racism, gender discrimination, disability and ableism, or childhood poverty into their work.

When we all realise that liberation for any of us is bound up in liberation for all of us *and* when impacted people are embedded in leadership throughout the movement, the divisions between us become less relevant to our work than the sense of belonging.[17] This means that in practice and in genuine movement-led organisations it will *more often than not* be people with lived experience in primary leadership roles who do the inviting to tables and active engagement of diverse perspectives. It also means that their intentions will not be to have power over their employees or anyone else they engage, but that they will be actively fostering spaces where *everyone fighting for our collective liberation* feels at home and like they can flourish in these spaces. It does not simply reverse who is leading and who is led; rather, it entirely upends the concept of hierarchy and begins with validating each other's strengths and diversity in how we all fit together.

This means (as mentioned in the Introduction) that this work is not overnight work, the fast fashion of nonprofit changemaking, or easily wedged into existing systems and structures. The work is slow, and it is important to create a strong foundation to build on just as we make our six-month, three-year, and ten-year plans. As you read through the next sections outlining our framework, remember that this is a long-term roadmap to meaningful engagement. This handbook and its tools are not a one-month implementation project; they are a lifelong work of dreaming, collaborative co-creation, and slow, steady progress towards a new future. We make it happen by practicing it until we have built the “muscle memory.”

As Menendian and powell note in their book: “Proximity does not ameliorate hatred; in fact, it can inflame it.”[18] Belonging isn’t created purely by “team spirit” activities (though connection is a necessary part of belonging). The temporary endorphin high of shared celebratory chants of “survivor leadership” or “collective power” are not themselves enough to transform institutional spaces for true belonging and collective action. After all, the poet Wendell Berry has said: “Community is not just about a feeling. ‘Community spirit’ is worthless unless there is a practical interdependence that’s worked out and economic.”[19]

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[17] Aboriginal organising collectives that included Gangulu elder Lilla Watson co-developed the phrase, “If you have come here to help me, you are wasting your time. But if you have come because your liberation is bound up with mine, then let us work together.”
[18] powell & Menendian (2024), p. 31. This dynamic happens in some attempts as “survivor engagement” that focus on the presence of survivor leaders rather than the structure of the space.
[19] Samuel (2022), p. 102.

Belonging and "benevolent prejudice"

Benevolent prejudice is when prejudice functions "in a caring, paternalistic mode (rather than a hostile, antagonistic one)" that both justifies and reinforces inequality.[20] Women are "protected because they are weak" rather than honoured because they deserve dignity. Immigrants are offered help "because they are ignorant" rather than because the demands of learning a new language and culture are inherently overwhelming. People from impacted communities are engaged in processes "because they'll learn how we do things through proximity" rather than because their insights are invaluable for *us* to learn. People with lived experience are engaged in "survivor leadership" because "it is good for their self-worth" rather than being engaged in movement leadership because they have and continue to develop vast insights that make our work better.

In *Belonging without Othering*, Menendian and powell note that "although so-called 'hostile' prejudice is the more familiar form, some scholars regard 'benevolent' prejudice as more insidious" because of the ways it justifies and maintains inequality. For example, when a dominant group acts warmly towards those they see as subordinates in order to keep them "in their place" or from rebelling, it can be harder to see it and name it for what it is.[21]

Benevolent prejudice offers kindness to impacted communities without really addressing why they are impacted in the first place. Without questioning the extreme disparities or exclusion that lead to groups of people having less access to resources or community "the conditions for belonging cannot arise or exist."[22] And when we *do* question why these disparities exist in the first place, it necessarily leads us to rethink how we engage with impacted people not just as leaders, but how we engage with them and their communities as beneficiaries of our work. It requires us to think more about solidarity instead of just charity, more about long term care instead of only crisis intervention, and more about belonging instead of just representation of different demographics.

In *On Belonging*, Kim Samuel writes: "I sometimes think of caregiving like tending to a garden. Do we water our plants only when the leaves brown and droop, and the petals start to fall? Of course not. We know that in order for that garden to thrive and be beautiful, it requires regular maintenance. It requires nurturing. That's how we should think about our relationships to one another."[23] This is true for how we can approach our efforts at exploitation prevention, protection, and partnership – by not waiting for people to be exploited before we deem them worthy of our solidarity and care. We don't have to wait for a power dynamic to exist before we offer care, and impacted people shouldn't have to be seen as "irredeemably dishonoured" before they can access empathy and support.[24]

"All social justice work is science fiction. We are imagining a world free of injustice, a world that doesn't yet exist." - adrienne maree brown

[20] powell & Menendian (2024), p. 37.
[21] powell & Menendian (2024), p. 48.
[22] powell & Menendian (2024), p. 141.
[23] Samuel (2022), p. 148.
[24] Orlando Patterson is cited in *On Belonging* (p. 21) as saying: "The degradation of slavery defines the slave as the ultimate 'other' in the eyes of non-slaves – someone beyond the pale, base and irredeemably dishonoured – which, in turn, enhances her isolation."

Belonging reflections

All people, no matter who they are, want to belong. Our human need to belong is normal, natural, and not a sign of weakness. We are meant to be interdependent, to care for each other, and to want care. An organisation that is genuinely trauma-informed and centred on the needs of impacted people will be conscious of how belonging is fostered for all people – not just those without lived experience and not just those who have lived experience. Genuine community is interrelational and everyone belongs.

Questions for reflection, discussion, or journaling:

1) Where is somewhere in your life that you feel the most belonging, where you can relax without worrying about being judged or having to "perform"? How can you tell when you feel belonging?
2) Has your human need for belonging ever led you to do something you didn't otherwise want to do? How can you be careful to never create that dynamic for someone else?
3) Consider your responses around values in the Inclusion Reflections earlier in this handbook. How will you balance values alignment with belonging? Is it possible to have a sense of belonging where there is no values alignment? While it is impossible to make everyone happy at once and that no organisation can be everything to everyone, consider your ethical priorities and plan in advance for how you will navigate challenges around values and belonging with integrity.

Our Meaningful Engagement Framework

"When I first started working full-time in anti-trafficking, I didn't disclose my survivorship. I had a decade of professional experience in nonprofit anti-violence work, including in direct services. I had years of experience as a movement organiser. I had a master's degree (but not in a clinical field). And still, whenever I said anything that challenged 'the way we've always done things,' my expertise was invalidated.

When I would make programmatic suggestions based on my professional expertise that they didn't like, they would speak over me and remind me that I'm not a clinician. When I would frame issues in a way that contradicted anti-trafficking norms, academics would speak over me and remind me I didn't have a PhD. When I would speak from my intimate knowledge of activism, non-survivors would speak over me citing what 'survivors' say they need. After the twentieth time researchers tried to shut me down by telling me what 'survivors' need, assuming I wasn't one, I disclosed my trafficking survivorship.

I hadn't wanted to, because I'd seen the tokenising ways survivors had been treated in anti-trafficking. But I also didn't feel like I would be taken seriously any other way, which is itself a sign of how deeply tokenised we are in this work. Disclosure as a survivor is the price you pay to have your lived and professional experience honoured, but it also relegates you to selective engagement and you have to fight constantly against ongoing tokenisation."

In anti-violence sectors that emerged from movement activism, whether or not someone has lived experience is less often a topic of discussion. Survivors of intimate abuse work in the domestic and sexual violence fields at all levels without being categorised as "survivor leaders." 2SLGBTQ+ and racially- or culturally-marginalised individuals run advocacy organisations without being referred to as "lived experience experts." The very categorisation of "lived experience leaders" assumes a need to name this as unique or extraordinary in a field in which most leaders are not impacted people and ignores the intersectionality of people's lived experiences. Impacted people cannot often separate out their trafficking experiences from the racism they experience or their gender identity from their employment abuse, for example.

This has created a paradox that challenges our efforts to understand and improve meaningful engagement. Consider the anti-trafficking sector as an example.

On the one hand, people with lived experience have not been engaged in decision-making and leadership in the anti-trafficking sector at large. The sector has not typically taken its direction from the many movements to end violence, to the point of harm and violence happening within the sector itself in the name of "movement." We can't change what we can't measure, and we

can't measure the presence, experiences, or impact of people with lived experience without requiring some degree of disclosure.

On the other hand, our ultimate goal is a movement without rigid divisions between "survivors" and "allies," and in which disclosure is not expected or required. Achieving this will require meaningful culture shifts that usually do not happen overnight. However, this kind of change is more resilient to the typical backlash that accompanies most pushes to address power dynamics.

Keep this tension in mind as you read through this handbook and adapt its tools for your use, and make the best decisions you can for your work considering your current situation, context, and goals. ***And remember: Even if nobody has disclosed, you are already working with impacted people in your organisation and among your partners and colleagues.*** They may not disclose for a variety of reasons, including not wanting to be defined by their trauma or relegated to expectations of "survivor leadership."[25] But they are in this work, which makes meaningful engagement practices essential.

The engagement of people with lived experience in policy, research, and programming can take many forms, from no involvement at all to being led entirely by impacted people and communities. We can think of this as a "spectrum" of different ways people with lived experience engage in the work. Spectrum is a way of thinking of things as existing along a scale (that can extend in all directions), rather than just as an on-off switch. When thinking about colour, for example, there is a spectrum of colours between red and yellow that includes various shades of orange. Because spectrums are non-linear, there may also be lighter and darker shades of orange with other colours blended in. Thinking about engagement of people with lived experience as a spectrum helps us remember that "survivor leadership" encompasses more than simply whether or not something is "survivor-led" and that lived experience leadership can be thought of as a spectrum of many different levels and kinds of engagement between "not survivor-led" and "survivor-led."

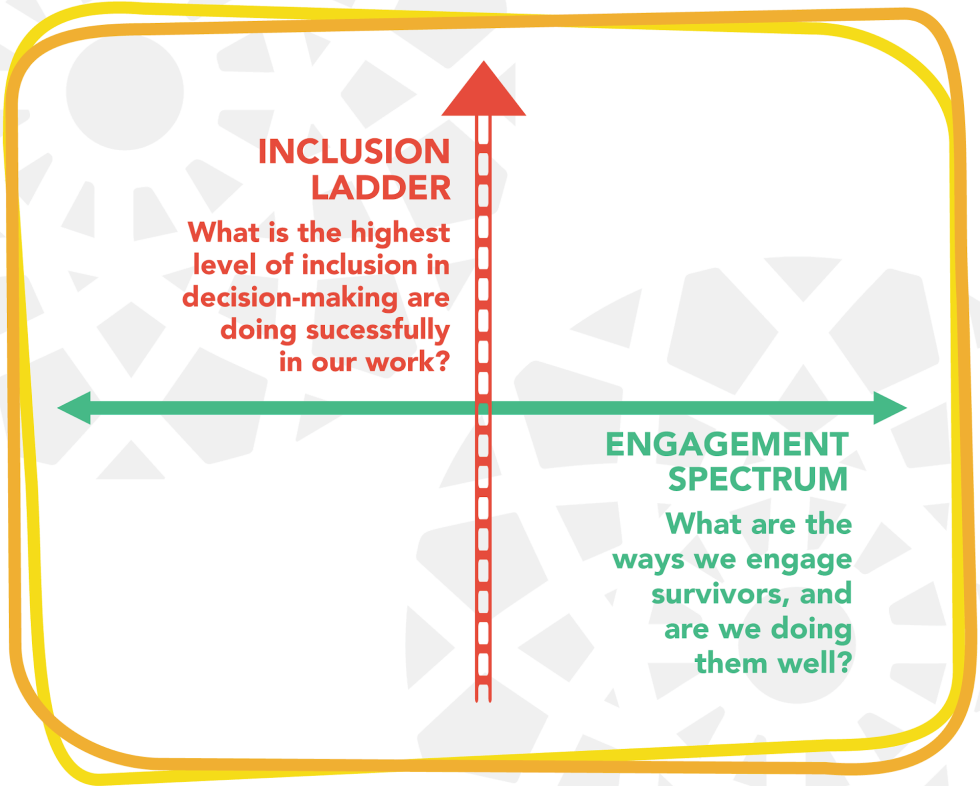
Consistent inclusion in programme development, delivery, and decision-making is essential to a movement that is truly informed by lived experience expertise, and it is important to engage people with lived experience at all levels in order to maintain transparency and ensure robust incorporation of diverse voices from impacted communities. This does not mean that every person with lived experience *needs to be* or *wants to be* in a key decision-making role, or that all

[25] In this toolbox we have intentionally used the framing of "meaningful engagement of people with lived experience" rather than "meaningful engagement of survivors." First, we recognise this framework's relevance beyond movements and sectors that work with "survivors." Secondly, the framing of "survivor" does not work in many global contexts even among those who have experienced violence, or that many individuals who have experience that fits legal definitions of certain forms of violence intentionally avoid the label of survivor due to politicisation in legal framings. That said, there is a lot of conversation in the anti-trafficking and related sectors about "survivor leadership" and "survivor-led." Accordingly, where we are reflecting on standard "survivor leadership" norms we have chosen to mirror this language.

people with lived experience want to become “survivor leaders.” Ultimately, having access and choice over participating in co-creation is essential and “active participation is an indicator, though not a requirement, of belonging.”[26] For all involved groups to feel belonging and meaningful engagement – whether people with lived experience of an issue, “allies,” or people from related impacted movements – requires *the possibility of* a process of co-creation (and not mandated participation in one). **This process of co-creation must be “iterative and nuanced” – which means that involved groups continually revisit decisions with new information to collectively find impactful solutions rather than “feel-good” quick fixes.**[27]

This means that while you want your engagement of impacted individuals to be consistent and meaningful across all levels of the spectrum, you also want to strive to implement the highest level of non-tokenising engagement that is accessible and sustainable.

A helpful way to visualise this framework is to think of the *spectrum* emphasising quality and care at every level of engagement, and the *ladder* emphasising the commitment to continually centring and supporting the leadership of impacted people.



[26] powell & Menendian (2024), p. 143.
[27] powell & Menendian (2024), p. 160.

Lived Experience Engagement Spectrum

My dream movement would model the ideals it is working towards. It would practise freedom rather than just talking about or fighting for it, with dignified processes.

- Collective Threads Initiative Co-Creation Partners

The Lived Experience Engagement Spectrum provides a framework that allows impacted people to participate in the level that aligns with their interest, skills, and time. Kim Samuel says that "belonging through purpose – the ability to create meaning in our lives and to share our gifts with the world – provides a vital sense of 'why.'"[28] People's gifts don't have to be identical or their contributions the same in order for them to be valuable or meaningful, and the levels at which each person engages on each project may be different from one project to the next. Thus, the engagement at each level is meaningful: ethical engagement at the *Empower* level is no less meaningful than ethical engagement at the *Ask* level.

The levels in the spectrum (which were adapted from the International Association of Public Participation's Spectrum of Public Participation by Chris Ash for Expanding Our Reach, 2019) are:

1. ***Inform***: Keep people with lived experience and other impacted people informed about decisions that impact them, in ways that reflect their identities.
2. ***Ask***: Seek out and review feedback from impacted communities and people with lived experience, incorporating when possible and being transparent about where, how, and when the feedback will be used.
3. ***Involve***: Work with impacted people throughout planning and implementation on the co-creation of policies and programmes in ways that model your organisation's values while being transparent about limitations.
4. ***Collaborate***: Work closely with impacted people on each aspect of programme development and implementation, from exploring options to making final decisions. Maintain transparency about the decision-making process at each stage.
5. ***Empower***: Final decision-making power for all programming from inception to implementation rests with impacted communities and people with lived experience. Belonging for all participants, staff, and people in the organisation or movement is prioritised as a value.

Empower is the highest level of lived experience leadership and *Inform* does not automatically indicate lived experience leadership at all (but may be the perfect level for people who don't have the time, interest, or skill to engage at higher levels at this point in their lives). That said, each level has unique value towards building a strategy, an organisation, or a movement in which impacted peoples' needs are centred and their voices are valued. At each level of the spectrum, consider *why* your organisation does the practices it does. On the lower levels,

[28] Samuel (2022), p. xvii.

ensure that people understand *why* you do things like screenings and needs assessments, and whether those purposes truly serve the people you're working with. At the higher levels, ensure that people understand *why* we want to increase lived experience leadership – that it is to improve practices, strengthen communities, and support enhanced outcomes for impacted people, and not just something we do to check a box or claim "survivor engagement."

While all levels of the spectrum are essential to a thriving movement, our ultimate organisational goal is to strive towards higher levels of engagement. Throughout this handbook, consider which level is the *highest level your organisation is currently doing well*, and develop strategies to shift to the next level. Details, tips, and guidance for continually increasing your level of successful engagement will be provided in the *Lived Experience Inclusion Ladder* section of this handbook.

Inform

At this level, we keep impacted people informed about decisions that impact them. We are not necessarily seeking their opinion at this level; we are just making it clear what is happening and why it is happening. This is not lived experience leadership, but it creates transparency – one of the principles of trauma-informed practice. However, it creates conditions that increase the agency of people with lived experience. When the communications we offer genuinely reflect the realities of impacted people (rather than being sanitised or stereotyped), they know our work is *for them* and that they belong. When impacted people have access to plain-language, clear, and accurate information about programmes, policies, and research, they are better able to form and share their own opinions on both personal and community levels. When impacted people are informed, they are less dependent on third-party supporters to help them make choices about their care and safety. Informed participants can create their own policy recommendations and their own talking points.

INFORM		
Putting it into practice	*When is it appropriate?*	*When is it not appropriate?*
• Ensure that fact sheets, newsletters, and websites are in plain language, disability-accessible, and language accessible, with language and imagery that reflects the realities of impacted people. • Ensure that safeguarding and grievance policies are easy-to-find and clear. • Provide transparency in advance about how lived experience feedback is used and incorporated. • Develop and implement feedback loops to follow up and inform impacted individuals of actions taken after complaints or progress on projects they contributed to. • Ensure that impact reports are engaging and in plain language.	• When you need to ensure that current clients and community partners know how to find information, policies, and services that impact them. • When you are looking to maintain accountability and transparency.	• When it is a substitute for engagement of people with lived experience in developing and implementing policies, programming, and research.

Ask

At this level, we intentionally seek out and review lived experience feedback and incorporate it when possible. This is a common way to engage people with lived experience in review of existing policies, programmes, and research. While many organisations may bring on consultants with lived experience to provide review and feedback of projects in-progress or being implemented, an often overlooked but essential way to seek out crucial feedback is through meaningful and ethical engagement with your current clients. Ask them what they need to be successful or what the barriers are to their safety and healing. Ask them how your programmes are meeting their needs and how they could be improved. Ask current contractors or employees with lived experience about how they experienced your *engagement* opportunities. Have a plan in place for soliciting, receiving, *and acting on* critical feedback so

that you can continually improve your work. And ensure that the people whose guidance you are asking understand where, how, and when the feedback will be used to avoid a perception of secrecy or confusion over outcomes of the engagement. While some engagement at this level may be uncompensated, participants in surveys that take longer than ten minutes, focus groups, and document review should *always* be compensated.

ASK		
Putting it into practice	*When is it appropriate?*	*When is it not appropriate?*
• Consistently survey people with lived experience in your client base, consultants, and staff about their experiences with the engagements. • Conduct focus groups of current clients, contractors, or staff with lived experience regarding their experiences with your organisation. • Compensate people with lived experience (who may not already be staff or regular contractors) to review and provide feedback into existing documents, plans, policies, or programmes. • Ensure people understand what will be done with their feedback.	• When you are seeking essential feedback from current clients with whom dual relationships may need to be avoided.[29] • When you are soliciting evaluation feedback from current contractors or staff. • When reviewing and updating existing documents for which a complete overhaul is not appropriate or accessible. • When making decisions on kinds of grants to pursue.	• When there is no intention to hear or incorporate feedback and people with lived experience are expected to "rubber stamp." • When you are seeking only feedback that validates your existing beliefs. • As a substitution for greater levels of lived experience leadership. • When impacted individuals are asked to give feedback or collaborate on programmes without adequate compensation.

[29] A "dual relationship" is when a therapist, case worker, or other service professional has more than one relationship with a participant that could present a conflict of interest. For example, if a shelter employee or case manager offers to hire a participant for a speaking engagement, the shelter participant may worry that if they say no it will negatively impact their access, care, or safety at the shelter.

Involve

At this level, organisations work closely with people with lived experience throughout planning and implementation to co-create policies and programmes. This means that impacted people are involved from the beginning of envisioning the project plan or funding proposal to ensure that the foundations of the work are solid and that there is a process for them to engage with the project team on an ongoing basis to provide feedback on the progress and provide final review. Ensure that the co-creation process models your organisation's values (rather than simply referring to them) and be transparent about any limitations. When everyone involved in this work know the limitations in advance, they can provide feedback that is responsive to those limitations. At this level, it is expected and customary to compensate people with lived experience for their time.

INVOLVE		
Putting it into practice	*When is it appropriate?*	*When is it not appropriate?*
• Conduct focus groups of people with lived experience regarding their needs, experiences of services, and insights before beginning a project or programme planning. • Hire consultants with lived experience or consultant review teams that are project or programme-specific and have ongoing input throughout planning and implementation. • Establish paid lived experience advisory councils to provide ongoing guidance to organisational leadership. These may be impacted individuals who do not have the capacity, time, or skillset to serve on boards or as staff, but who have insight that could shape your programmes.	• When reviewing grant proposals or business development proposals. • When you don't have lived experience leadership internally.	• When there is no intent to incorporate the voices of impacted individuals. • When the involvement of people with lived experience is tokenising.

Collaborate

At this level, the organisation or movement works closely with people with lived experience on each aspect of programme development and implementation, from exploring options to making final decisions. This level of engagement *within* an organisation would mean impacted people are well-represented among your employees or regular contractors. At a programmatic, community, or regional level, it means that your organisation collaborates with partner organisations or initiatives that are led by people with lived experience and that have a high level of meaningful lived experience engagement. Belonging at this level requires interrogating hierarchy and who it serves, which means that organisations and individuals must maintain transparency about the decision-making process at each stage.

COLLABORATE		
Putting it into practice	*When is it appropriate?*	*When is it not appropriate?*
• Employ people with lived experience on staff or as regular contractors doing programmatic, policy, or research work, without expecting or requiring them to share their stories or to be defined by their trauma. • Develop and implement internal lived experience leadership equity initiatives. Assess your organisation for equitable access, upward mobility, compensation, and job satisfaction among staff with lived experience compared with other staff. Conduct equity analyses of your staff with lived experience compared with the populations you serve. • Integrate information about processes (not just outcomes) in reporting that is shared within your organisation to build trust, transparency, and buy-in.	• When people with lived experience are well-supported in pursuing the kind of leadership they would like to engage in. • When impacted individuals have choices about the kinds of jobs they can do. • When funding and power are shared between well-funded organisations and grassroots partners.	• When people with lived experience are being asked to do work they do not have the skills for or are not prepared to do – which is tokenising. • When there is an absence of internal organisational work and change to build readiness for working with people with lived experience as colleagues. • When an organisation has not prioritised racial equity, non-discrimination, and trauma-informed organisational practice.

Empower

At this level, impacted communities and people with lived experience have final decision-making power over policies, programming, research, and implementation. The organisation or programme implements the strategies and decisions impacted people develop in full partnership. While this level of engagement can be ideal, it may not be ideal for every project. For example, a team of people with lived experience of assault who are developing a protocol for assessing a traumatic brain injury must also have healthcare knowledge, training, and skills. At this level, belonging for all participants, staff, and people in the organisation or movement is prioritised as a value. ***And remember: Since not all impacted people agree on every action, this level requires intentional planning for collective voice, navigating conflict, and mitigating power dynamics.*** For example, empowerment does not mean that leaders with lived experience impose their stories upon others (which does not foster a sense of belonging); rather, that leadership should hold space for the complex realities of a diverse group of experiences.

EMPOWER		
Putting it into practice	*When is it appropriate?*	*When is it not appropriate?*
• At this level, organisations will have hired staff with lived experience across a majority of managerial, executive, and leadership and decision-making positions. • The project or programme team will be led by people with lived experience, including for decision-making and budgetary concerns. • Values are clarified and implemented to the extent that all involved people (regardless of lived experience) feel a sense of belonging in the work.	• When the impacted individuals are selected for their skills rather than their trauma and are well-supported in their leadership development. • When organisations are making meaningful progress on readiness for working with people with lived experience as colleagues. • When an organisation has made meaningful progress on racial equity, non-discrimination, and trauma-informed organisational practice.	• When the organisation's board or executive leadership is not prepared to support, develop, and empower the impacted individuals in leadership positions. • When the individual does not have the skills to perform the leadership role and there is no plan in place to build and develop those skills before they are expected to perform. • When those in leadership weaponise their lived experience (or level of involvement in a specific anti-violence sector) over other involved people.

At all of these levels, people with lived experience should be compensated at least at the same pay rates as other professionals doing similar work, and even more generously in order to accommodate for the impacts and unique needs of working as someone with lived experience.[30] Their workloads should be comparable to other employees and it should never be mandated that staff with lived experience share personal or intimate details of their trauma as a precondition for their work.

In short, meaningful engagement of people with lived experience means:

- That an organisation incorporates **multiple, layered approaches** at all levels of the spectrum.
- That mechanisms are in place to **receive and act on critical feedback** about programmes as well as impacted individuals' experiences working with the organisation.
- That the impacted individuals engaged represent a **diversity of identities, experiences, and perspectives**, fostering a sense of belonging for all.
- That the **values** that foster meaningful engagement are sustained by the organisation even when people with lived experience are not in the room.
- That the organisation **strives for the highest level of engagement** that is possible for each project, programme, or decision.
- And that the engagement is implemented in a way that **aims to prevent harm to the people engaged and make repair when harm happens**.

[30] Note that employee differences in compensation and workload are complicated by more than lived experience of the organisation's issue, and are also impacted by gender, race, and other issues. We cannot address disparities based on lived experience without addressing all types of disparities, and should strive for a holistic, solidarity-based approach to equity.

The Lived Experience Inclusion Ladder

My dream movement would work for the collective, with an ultimate goal of evolving into vibrant communities which will eventually replace it.

- Collective Threads Initiative Co-Creation Partners

> *"When I think of being meaningfully engaged in this work, I think of how it felt like a breath of fresh air the first time I was treated as a person with valuable skills and knowledge to be shared, not just as a sad, scary story to tell people. Being first built up by having a mentor invest in my professional and personal development, and then valued as an expert in the work instead of just a traumatised person, was so empowering and transformative even just beyond my own life. It helped facilitate intergenerational healing in my family, and I've also been able to take what I've learned to further help others in my grassroots community work."*
>
> *- CTI Community Partner*

The Lived Experience Inclusion Ladder is a way to envision and affirm a commitment to increasing the highest levels of *meaningful* (rather than tokenising) lived experience engagement in decision-making and leadership that are possible and realistic for people with lived experience. While the Lived Experience Engagement Spectrum ensures that we are acting ethically and thoughtfully in every level we use, the Lived Experience Inclusion Ladder reminds us that we must move beyond tokenising if we want a sector that is truly centred on impacted people and a movement led by people with lived experience.

If people with lived experience are only informed of decisions being made by people without lived experience, they are participants, not leaders. Organisations and the sectors they are part of should strive to implement the highest level of non-tokenising engagement that is accessible and sustainable, while intentionally working to address concerns around *accessibility* and *sustainability*.

Accessibility	Sustainability
• Having impacted people in your community interested in and capable of doing (or learning how to do) your work. • Grant funding that allows for equitable compensation and benefits. • Not expecting staff to pay upfront for work-related expenses such as travel. • Disability accessibility prioritised, including for different learning styles and mental wellness. • Parent-friendly and family-supporting workplace policies. **What else would make higher levels accessible in your work?**	• Trauma-informed organisational practices and emotionally-intelligent leadership. • Commitment to avoiding overwork and burnout. • Willingness to incorporate regular and ongoing leadership development as a routine part of all employees' compensation and time. • Culturally-inclusive and racially equitable workplace practice. • Adequate funding for workplace support necessary for people with lived experience to thrive. (See FreeFrom for ideas.) **What else would make higher levels sustainable in your work?**

You move your organisation up the ladder by assessing and building your organisation's capacity to support higher levels of organisational engagement of people with lived experience while remembering that not all programmes or projects must have the same level of engagement. Inclusion looks different from one task to the next and also from one project to another. For example, it is possible to have a finance department with no staff who have disclosed lived experience of the organisation's issue but still have financial processes that are inclusive of common lived experience needs.

In our work, this means that each project, each task, and each programme eventually has to design and think about what appropriate meaningful inclusion looks like. Within one organisation, different departments and teams may be on different rungs of the ladder. The goal isn't to move more individuals into the top of the hierarchy – it is to "build a bigger 'we' and [have] leadership that is outward-looking rather than insular."[31]

Experiencing violence or oppression can lead to trauma, restriction of agency, and economic exploitation. Because of this, an inclusive organisation will always remember that Western, capitalistic models of professionalism and knowledge are not the only models and that they may

[31] powell & Menendian (2024), p. 198.

be a barrier to belonging. Similarly, formal education or degrees are not the only way skills can be developed. To be an inclusive organisation, honour indigenous and culturally-specific ways of knowing, facilitation, and healing. Create reciprocal relationships by offering professional development to support your staff in their unique career goals. Recognise the trust and belonging that develop when your team has the opportunity to see people who look like them, have similar life experiences, or come from their communities succeeding in the organisation, particularly among leadership.

A Vision of Hope

My dream movement would be inclusive and different movements of impacted people (anti-racism, immigrant rights, feminist, etc.) would work together.

- Collective Threads Initiative Co-Creation Partners

People who are directly impacted by the issues that our movements are organising to address – whose lives and communities have been disrupted by extreme exploitation, abuse, and oppression – understand the problems best. They know how their issues happen, and what those harms can do to an individual's sense of safety, economic security, health, and relationships. They know what exploitation, abuse, and disruption can do to entire families or communities.

Importantly, they are also closest to the solutions. They can understand how best to translate evidence into action for sustainable impact. They know what their communities need, what their communities will resist, and what needs to change in their communities.

Any efforts to end exploitation, abuse, and oppression will be bound by the degree to which they embrace meaningful lived experience leadership. The best efforts to address these and related issues will view impacted individuals and communities as full collaborators and will maintain the trust of their participants, which means they *must* be centred on the needs of people with lived experience at all levels of the organisation, policy, or programme. This will ensure that an effective infrastructure to address these kinds of violence will be developed and we will know that the sectors addressing our movements' issues will be powerful, led by and working alongside impacted people – and with everyone involved feeling a deep sense of belonging.

We understand that some reading this may be in agreement with the concepts and inspired by the work, but nevertheless hesitant to make the leap with us. People with lived experience may be averse to giving up well-paying but tokenising models of leadership or to do new work they have not done before. They may fear that others will think they are an imposter. Or they may worry that they don't know how to navigate systems well enough or how to advocate for the collective beyond just what they've experienced. They may also feel intimidated by a full-hearted embrace of a collective vision for liberation.

Some organisations may be concerned that critical evaluation of their meaningful engagement practices may reveal deficits they hadn't addressed, highlight how past practices caused harm, or cast doubt on past work that their employees are proud of.

In order to foster real transformation, we have to give ourselves and each other permission to admit that what we were doing is no longer working and that it may have caused harm. We have to create space to acknowledge the shortcomings of past approaches without it being detrimental or ostracising. Perfectionism and inability to admit the need for change serve only to reinforce the status quo and keep us stuck in harmful patterns.

Some organisations are doing meaningful engagement very well. Most are doing well in some areas and struggling in others. As we dream about where we are going, we can honour what is going well, and – with honesty, gentleness, and humility – we can frankly discuss what still needs work. Transforming our organisations, sectors, and work to be centred in lived experience, using meaningful engagement of impacted individuals and communities, and moving towards becoming lived experience-led is not small or easy work. Our allies will have to decentre themselves as they learn to share power in new ways. Our funders will have to rethink their role and what "success" genuinely means. Our organisations, government agencies, and leadership will have to remove barriers to meaningful engagement that may be embedded in their practices, norms, and biases.

At Collective Threads Initiative, we are profoundly inspired by queer, Black feminist scholar Alexis Pauline Gumbs' work on "Prophecy in the Present Tense."[32] Alexis describes how, at the time when Harriet Tubman was alive, most people could not even imagine that there would be a time when chattel slavery would not exist in the United States. Tubman dreamed of her people being free, was able to imagine a future without chattel slavery, and then was able to do the work to make it happen, declaring "my people are free." Alexis calls this prophecy in the present tense – affirming in the now the fundamental truth of who people are honouring their inherent dignity and then acting like freedom is our unbreakable, irresistible outcome.

When we host workshops – dreaming sessions in which we invite our partners to co-create a world of dignity with us – we close by inviting our participants to share their own prophecies in the present tense.

People in our communities have access to wellness. Our communities have access to rest. Nobody has to navigate hard times alone.
We live in a green world that is hopeful.
There is room for failure, and it is okay.
We work together and are creating genuine collaborations.
Children are allowed to be children.
All work is decent work.
We are freeing ourselves. Each person is doing their part.
My people are free.

[32] https://www.jstor.org/stable/10.2979/meridians.12.2.142

And now we invite you to dream with us – to see the world that we are co-creating, to envision the structures and systems that will support that world, and to align your practices with how it all will work. This transformation will not happen overnight. We all must work to advocate for meaningful engagement of people with lived experience in our professional and social spheres of influence. We must critically examine what barriers we unintentionally place in impacted individuals' paths and commit to removing those barriers. Together, we will be successful in our shared vision: ending exploitation, abuse, and oppression.

Closing reflections

We cannot create what we cannot imagine. All creation starts with dreaming.

Questions for reflection, discussion, or journaling:

1) This work loses meaning when we cannot practise the things we are working towards, like care, equity, and rest. What are the things you are working towards that you need to also prioritise for yourself and your teams? How can you bring more of those into your work?
2) All of us, no matter what our lived experiences and identities are, are working to address and break down our internalised oppression and unconscious biases. What are some of the internalised beliefs that are holding you back from bringing your gifts into the work? Are any of them hindering you from accessing the things you thought about when you responded to Question 1?
3) As you dream about what your work *could* look like, and what the systems you work in *could* look like, what comes up for you? Now dream bigger and envision those systems entirely reimagined (rather than just reformed). What comes up now?

Annex 1: Evaluation, Tools, and Assessments

My dream movement would grow and change over time, and be open to learning and unlearning.

- Collective Threads Initiative Co-Creation Partners

We measure what we value. While organisations may be expected to also measure things based on funder requirements, beyond those constraints **evaluation can provide a systematic process for measuring meaningful engagement with people with lived experience over time.**

While our online hub of tools to accompany the handbook is growing and new tools are added regularly, the core tools for this handbook available at the time of publication for the second edition include:

- **Toolbox Definitions** - A living glossary of words used in our toolbox that lives on our website.
- **The Wheel of Engagement** - A tool housed on our website where those who do not have time or capacity for a full evaluation or otherwise deep dive into meaningful engagement can access randomised, bite-sized suggestions for simple changes to improve engagement of people with lived experience.
- **The Lived Experience Engagement Planner** - A tool to help you determine needed supports to foster meaningful engagement across the levels of the spectrum in a project, team, or department.
- **Meaningful Engagement Quick Start Guide** - A tool to determine concrete ways to get started and take manageable steps towards better engagements.
- **Meaningful Engagement Barriers and Opportunities** - A publication outlining commonly expressed challenges to meaningful engagement along with recommendations for preventing, mitigating, or addressing each.
- **Meaningful Engagement Organisational Readiness Assessment** - A self-assessment tool to help your organisation better understand your readiness for meaningful engagement as well as potential areas of improvement.
- **The Comprehensive, Abbreviated, and Participant Ladders** – Prebuilt surveys to help you assess your organisation's level of engagement and track it over time. Available as full standalone surveys, or as human resources/operations versions to be used in tandem with staff versions of the surveys.
- **Analysis Tools for the Lived Experience Inclusion Ladder Survey** - This includes the Average Score Chart, Ladder Results Table, Priority Score Worksheet, and Priority Matrix – and are intended to help you analyse your results on the surveys and develop a plan for next steps. We also have a Google Spreadsheet that can help calculate these more easily for you.
- **The Power Analysis Workbook** - A workbook to guide individual or group reflections on the power dynamics present in a project, programme, or activity so that mitigation strategies can be developed.

- **Lived Experience Leadership Analysis** - A worksheet to assist you in evaluating and understanding when organisations or initiatives indicate that they are “lived experience-led” or “survivor-led.”

All of these tools, and more, are available in the online tool library at Collective Threads Initiative’s website.

Readiness assessment

Organisations that do not initially have a high level of lived experience engagement may be excited to dive in but also worried about doing it “wrong” or causing harm. Those that have existing lived experience engagement programmes may also have mixed feelings: uncomfortable about opening themselves up to change and worried about buy-in from existing staff and partners, but enthusiastic about having a new resource for reflecting critically on their work. Our readiness assessment does not tell you whether or not you should work on meaningful engagement. Rather, it provides clarifying questions to help you assess potential points of tension, overenthusiasm, harm, or confusion before diving into our full work.

Surveys and evaluation

Evaluating your organisation’s lived experience engagement strengths and areas for growth will help you assess how you are doing, determine a plan for continuous quality improvement, and track your progress over time. Organisations can evaluate their programmes by tracking progress on “indicators,” which are measurable categories that indicate your strength or weakness in a given area. We assess how an organisation is doing on any one indicator by developing an “instrument” (a survey, for example) that asks about each indicator. In the survey itself, there are questions that are meant to measure each indicator (or components of the indicator).

Organisations can use the instrument to assess how they are doing and what still needs to be done. “Data analysis” means looking at the survey responses thoughtfully in a structured way to see “trends”[33] and findings that can be used to make decisions. Analysis typically also includes suggestions or a protocol for prioritising needs and developing an action plan for improvement of current services based on the data, and then the action plan is implemented. After a period of time to allow for meaningful work on the action plan, the assessment will be repeated so that progress can be tracked and a new action plan for the next steps can be developed. This repeating process of **assessment → analysis → action plan → improvement** is often referred to as “continuous quality improvement” or CQI.

Evaluation is often viewed by organisations as either a funder chore (“We do this to keep getting funded so we must look good to our funders”) or a scary task (“What if we don’t score well?

[33] “Trends” in this case does not mean something is trendy or fashionable. It means that the data from responses show that multiple people or groups of people reported something similar.

Does that mean we're bad at our work?"). In reality, your "score" is less important than what you do with the results of the assessment. The scores on the assessments and averages in your analysis do not tell you whether or not you are succeeding or failing, or whether or not you should be proud or ashamed. Rather, they give you information that you can use to have a more impactful strategy. **The goal is not to compare yourself with other organisations – "Who scored higher? Does that mean they're better than us?" Nor is the goal to beat yourself up over things you've struggled with. The goal is to evaluate your own organisation, identify and prioritise follow-up actions, and develop a strategy for implementing changes.** This is continuous quality improvement – and demonstrating a commitment to CQI speaks volumes about the intentions of your work!

> Often, organisations or their staff may view data collection as something that is done primarily to appease funders and stay in grant compliance. When done well and thoughtfully, data collection and analysis for CQI can be one of the most valuable and essential processes an organisation can engage in. It is important to incorporate evaluation into your budgets, staffing capacity, and timelines when developing funding processes.

Our repository includes a series of surveys and analysis tools you may use to track and evaluate your progress at continually increasing your level of effective, meaningful engagement of people with lived experience in your work. **Not all tools will be appropriate or effective for your particular organisation**. Just as you likely wouldn't need to use every tool in your toolbox to build a piece of furniture, you don't have to use every tool in our toolbox.

Programme and organisational evaluation are new to us. Where can we learn more?

For introductory information about programme evaluation, see:

- The Basic Principles of Program Evaluation by Nonprofit New York
- A Framework for Program Evaluation: A Gateway to Tools from Community Toolbox
- Introduction to Program Evaluation for Public Health Programs: A Self-Study Guide by the U.S. Centers for Disease Control

For more information about how to use equitable evaluation practices to ensure your evaluation methods do not unintentionally replicate problematic power dynamics and bias, see:

- The Equitable Evaluation Initiative
- Full Frame Initiative's Tradeoffs Analysis Tool

For more resources about planning and decision-making:

- Decision-Making with Pros, Cons, and Mitigations from The Management Center

Annex 2: Movements and Sectors

By Aubrey Lloyd, Chris Ash, and Sophie Otiende

1. **What is the core difference between a movement and a sector in addressing a social issue?**

A movement is fundamentally driven by the shared experience of injustice among the people leading and organising it. Its primary purpose is to build collective power through organising relationships with the explicit goal of strategically shifting the balance of power, informed by a broader social change agenda. In contrast, a sector develops and administers policies, programmes, research, and services related to an issue. While individuals within a sector may care deeply about the issue, they may or may not be directly impacted by it, and their ability to challenge power structures can be constrained by the systems they operate within, such as funding sources and institutional hierarchies.

2. **How do movements and sectors approach the concept of power?**

Movements aim to dismantle or significantly reduce the relevance of hierarchical power models by fostering shared power among communities. Their organising efforts focus on building collective power from the ground up to challenge existing power dynamics. Sectors, on the other hand, often operate within established hierarchical structures, comprising government agencies and registered organisations. While individuals within sectors might seek to address power imbalances, their actions can be limited by the inherent hierarchies of these institutions and the potential for negative repercussions if they significantly challenge the status quo.

3. **What types of structures and organisations are typically found in movements versus sectors?**

Movements exhibit diverse and often informal structures, ranging from individual organisers and mutual aid networks to unregistered grassroots collectives and registered organisations. They may also include peripheral volunteers. Sectors are characterised by a collection of formal institutions, including government agencies at various levels, non-governmental organisations (NGOs), and other registered entities. Individuals involved in sectors include leaders, employees, civil servants, volunteers within these organisations, and independent consultants or speakers focused on sector engagement.

4. **How are movements and sectors typically funded?**

The unfunded, grassroots elements of movements often rely on community-based and crowdsourced resources. Labour may be provided by community members or organisers with specific skills, reducing the need for monetary funding. Financial support may come directly from the affected community, as well as from friends and allies. Sectors are funded primarily by governments (for government agencies and a significant portion of NGO work) and through individual, corporate, or foundation philanthropy. This funding is typically administered in ways that align with the funders' objectives.

5. **How does the direct lived experience of an issue influence the work of movements compared to sectors?**

In movements, the direct lived experience of injustice is a central driving force. Those leading and organising are typically directly affected by the issue, shaping their understanding, strategies, and commitment. In sectors, while individuals may be deeply concerned about an issue, the leadership and strategy development may be carried out by people who are not directly impacted. This difference can influence the priorities, approaches, and the sense of urgency in addressing the issue.

6. **What is the primary goal of organising within a movement?**

The primary goal of organising within a movement is to build relationships strategically to shift the balance of power. This is done with a clear understanding of a larger social change agenda. The focus is on empowering communities and ensuring that power is more broadly shared, rather than simply increasing the number of individuals with power within existing hierarchical models.

7. **What are the main activities and functions of a sector in relation to a social issue?**

The main activities and functions of a sector include developing and administering policies, implementing programmes, conducting research, and providing services aimed at addressing a specific social issue. These activities are typically carried out by government agencies, NGOs, and other registered organisations that constitute the sector.

8. **What potential challenges or risks might individuals within a sector face if they actively challenge the existing balance of power?**

Individuals working within a sector who attempt to challenge the established balance of power may encounter significant pushback or risk losing funding. This is because the systems that govern, oversee, and support sector participants are often deeply intertwined with the very systems that create and perpetuate hierarchy. Funders, being part of this interconnected system, may be resistant to initiatives that fundamentally question or threaten the existing power structures.