HealthKnowledge

Further Resources

to

Interactive Learning Module

Learning from Stakeholders

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Transcript

Phase 1 – The Engagement Process

Chapter 1 – Stakeholder Engagement

A variety of definitions have been found:

1) Members of society who have an interest (a stake) in a specific policy issue;
2) A person or organisation that has a legitimate interest in a project or entity, or would be affected by a particular action or policy;

and

3) A person who has something to gain or lose through the outcomes of a planning process, programme or project.

What are the differences between definitions?

These different definitions lead to ambiguities in their descriptions. For example:

Definition (1) requires an 'up-front' awareness and a knowledge of the subject by the Stakeholder.

Definition (2) raises the question of 'legitimate interest'. We can argue that in relation to policy development all members of the public have a legitimate interest. For the purposes of this module we will use definition 3.

Definition (3) A person who has something to gain or lose through the outcomes of a planning process, programme or project.

Who are the Stakeholders?

There are many different types of Stakeholders, within organisations, within partner organisations and within the community.

For example,

If you are developing an alcohol reduction strategy your Stakeholders would include a Primary Care Trust, Local Authority, the Police, the Acute Trust, voluntary organisations, schools and youth groups as well as the general public

What do we mean by engagement?

We can describe the engagement of stakeholders in many ways. Engagement, consultation and participation are key words that can be used to describe different types of involvement activity.

There are also different levels of involvement for stakeholders.

This diagram demonstrates the different levels of involvement – beginning with giving information, gathering information, moving to fora for debate and then direct participation.

The statements beneath each level identify what can be achieved although these are blurred as one may lead to another.

The directional arrows are used to indicate examples of where it is possible to slide a technique along the continuum.

By moving towards the direction of participation opportunities are created for stakeholders to become more involved.

Why would Stakeholders wish to engage?

Stakeholders themselves may also have their own reasons for the level of engagement they select.

Here are four examples

- Those who participate 'defensively' because they may be new to partnership working and are attending in order not to lose out by their absence but may be unsure of the benefits that will accrue from participation
- Those who participate because they have a clear appreciation of the communication and networking advantages of partnership working and grasp these benefits opportunistically, seeing overlaps between organisations' agendas
- Or those who participate in an active way appreciate the benefits of collaboration and strive to extract the 'collaborative advantage' which derives from synergy and joint working
- And finally those Stakeholders who sometimes might need to be encouraged to participate. They might not understand their role or the reason for their participation and what they can offer.

End of Chapter 1.

Transcript

Phase 1 – The Engagement Process

Chapter 2 – Reasons for Engaging

Why do we engage Stakeholders?

Public sector organisations are committed to empowering both individuals and communities so that they can play a greater role in shaping health and social care services. It is easier for professionals to provide a better service if they understand what the community needs through stakeholder engagement.

What are the benefits?

There are many reasons for using stakeholders which include the transformation of services, support for programme development and funding, providing cross organisational support and offering a strong perspective from the community. It can also provide access to a wide range of views, expertise, values and beliefs which can be integrated into programme development and evaluation.

What are the legislative mechanisms for engagement?

Here are some examples as to how the government has responded to stakeholder engagement.

- The NHS Act 2006 includes Section 11 of the Health and Social Care Act which places a duty on NHS trusts, Primary Care Trusts and Strategic Health Authorities to make arrangements to involve and consult patients and the public in service planning.
- The Local Government and Public Involvement in Health Act 2007 announced a number of measures relating to local government and the importance of involving local communities
- And The Compact is an agreement established in 1998 between Government and the voluntary and community sector in England. It recognises shared values, principles and commitments and sets out guidelines for how both parties should work together.

Here are some examples of government and organisational strategies to engage stakeholders using the different levels of involvement:

Giving Information: Change4Life social marketing campaign uses television animation to encourage people in Britain to lead healthier lives, using the slogan “eat well, move more, live longer”.

Getting Information: Green Paper Consultation *Shaping the Future of Care Together* sets out a vision for a new care and support system. A number of consultation questions asks everyone to provide their views about how they think Government can make this vision a reality.

Fora for Debate: The Big Care Debate offers everybody the chance to have their say on the reform of adult care and support in England.

Participation: Local Strategic Partnerships aim to bring together local representatives from the public, private, community and voluntary sectors. Local councils generally take a lead role but encourages the engagement of others.

Here are some examples of how local organisations engage stakeholders:

- Local Authority Overview and Scrutiny Committees have, since 2003, had the power to scrutinise local health services.
- Patient and Public Involvement Fora were established in 2003 to bring the views and experiences of patients, their carers and families to NHS Trusts and Primary Care Trusts.
- World Class Commissioning (Competency 3) recognises the need for Primary Care Trusts to be proactive in seeking out the views and experiences of the public, patients, their carers and other stakeholders. Especially those least able to act as advocates in order to improve population health and reduce health inequalities.
- Local Involvement Networks (LINks) replaced the Patient and Public Involvement Fora (PPIs) in 2008.

Chapter 2 – Reasons for Engaging Stakeholders (cont.)

What are people saying about engagement?

> *"Our Involvement and Participation strategy sets out how we will develop our approach to engaging with users of public services"*

This quote from a Local Authority demonstrates their increasing priority to improving stakeholder engagement.

> *"You have the right to be involved, directly or through representatives, in the planning of healthcare services…"*

Here the NHS is seen to be encouraging local organisations to involve patients and carers in their planning and decision making process around the services they commission.

> *"They hear what we say, but are they really listening?"*

There has been a steady increase in the case of engagement with the general public, although they have concerns about the lack of feedback following participation exercises.

Principles of engagement

The following principles have been drawn from many public and private sector organisations experience of engaging stakeholders:

- You can think about focusing on clear objectives, showing how engagement can add value.
- Use engagement to drive decisions, not as a public relations exercise.
- Manage exceptions ensuring stakeholders have realistic ambitions.
- Devote adequate resources and remember to reimburse stakeholders for their time.
- Choose appropriate techniques to show achievements of objectives.
- Allow open communication, ensuring stakeholders are able to voice their views.
- Be accountable and clarify actions post engagement.
- And finally, learn from engagement, sharing success from engagement as well as the outcomes.

Now, here is an opportunity for you to consider, what we are trying to achieve. Over the next few minutes you will able to think about your engagement experiences.

Step 1: Take 5 minutes to think about when you have consulted stakeholders and write down all the reasons for engagement.

Step 2: Now discuss your findings, that is, what you got out of stakeholder engagement.

Step 3: Using the Purpose Grid in your workbook, think about the big picture, the general purpose, and the longer-term goals of why you want to engage stakeholders.

Step 4: Tick the boxes that link to the reasons you have described. Basically the more ticks you have towards the bottom of the list the greater the participation of stakeholders.

When shouldn't you engage?

Engagement is not a risk-free activity. If you cannot deal with the possible consequences you might be better off not starting it in the first place, because there are situations in which engagement in any form may do more harm than good.

Write down all the reasons why engaging stakeholders may not be appropriate.

Here are some reasons for not engaging, you may have thought of others:

- When there is no real commitment.
- When all the key decisions have already been made and the whole exercise is a waste of time.
- When there is no detailed knowledge.
- When there is not enough time.
- When there are insufficient resources to do the job properly.

End of Chapter 2.

Transcript

Phase 1 – The Engagement Process

Chapter 3 – Identifying Appropriate Stakeholders

How do you identify stakeholders?

Let's remind ourselves about who should be involved. The purpose of your engagement process should determine who you involve, so here are some tips to start you off:

- It is better to involve too many than to miss out some who are crucial.
- Beware of 'stakeholder fatigue'. This syndrome is caused by engaging the same people too often.
- Equally beware of engaging the 'wrong' people such as self-appointed opinion leaders, that have no mandate to speak on behalf of the community.

When we identify stakeholders we need to consider the following:

- Who is or will be affected, positively or negatively, by what you are doing or proposing to do?
- Who holds official positions relevant to what you are doing?
- Who runs organisations with relevant interests?
- Who has been involved in any similar situations in the past?
- Whose names come up regularly when you are discussing this subject?

Remember, 'stakeholders' are by definition people who have a 'stake' in a situation. These questions are designed to reveal the stakes as well as help to identify the right people to involve in any particular situation.

Who are the stakeholders?

Turn to your Case Study on Later Years in your Workbook and think about who the stakeholders might be for this scenario.

Here are some of the stakeholders you may have identified:

- Patients and Families
- Hospital Services
- Primary Care Trust
- Community Rehabilitation Teams
- General Practioners
- Private Carers
- Locality Teams
- Social Services
- Advocates
- Third Sector
- Age Concern
- Be-friending groups

As you may have found, the difficulty in identifying stakeholders is that everyone can have an impact on an issue in some way. Here the direct arrows show direct communication and involvement across a variety of people concerned with the Later Years issues. The dotted lines show those who may not be so directly involved on the face of it but hold key areas of responsibility e.g. the Primary Care Trust.

It is also important to remember the variety of people that the third sector already works with in many different ways. The following examples cover ways in which the third sector works with communities protected by the existing equality duties (race, gender, disability) these can be:

- Organisations representing Black and Minority Ethnic communities
- Organisations representing the interests of women
- Groups based on an affiliation to, or the ethics of, a religion or belief
- Organisations representing older people
- Organisations representing people with a disability
- Organisations representing lesbian, gay, bisexual and transgendered people

Chapter 3 – Identifying Appropriate Stakeholders (cont.)

Once a list of possible stakeholders has been created it is necessary to estimate their influence and importance.

Influence and importance have to be accessed in relation to the objectives you are seeking to achieve.

Influence: simply refers to how powerful a stakeholder is in terms of influencing direction of the project and outcomes.

Importance: simply refers to those stakeholders whose problems, needs and interests are priority for an organisation. If these important stakeholders are not assessed effectively then the project can't be deemed a success.

How do we assess influence?

Assessing influence is often difficult and involves interpreting a range of factors. Influence is best understood as the extent to which people, groups or organisations are able to pursue or coerce others into making decisions and following certain courses of action.

Here are some examples of types of influence:

- Legal hierarchy (command control of budgets)
- Authority of leadership (charismatic, political)
- Control of strategic resources (suppliers of services or other inputs)
- Possession of specialist knowledge
- Negotiation position (strength in relation to other stakeholders)

Other forms of influence may be more informal, that is, groups and stakeholders may:

- Have varying degrees of organisation and consensus in groups
- Be able to influence the control of strategic resources significant to the project
- Be holding informal influence through links with other groups
- Be dependent on other stakeholders in assessing their importance to the project issues

How do we assess importance?

Importance, relates to the priority given by an organisation to the stakeholders' needs and interests throughout the project. Here's a checklist for importance:

- Which problems, affecting which stakeholders, does the project seek to address or alleviate?
- For which stakeholders does the project place a priority on meeting their needs, interests and expectations?
- Which stakeholders' interests converge most closely with the policy and project objectives?

A technique to help identify which individuals or organisations to include in your programme or project is known as a stakeholder analysis. This technique can help you to identify:

- What roles they should play and at which stage.
- Who to build and nurture relationships with.
- Who to inform and consult about the project.

How to read the Stakeholder Analysis

Each quadrant can be analysed in the following way. In a clockwise rotation:

- Quadrant one, high influence and high importance need to be fully engaged on the project.
- In quadrant two, those people with high importance and low influence need to be kept informed and could become an interest group in their own right.
- Those in quadrant three, that have low influence and low importance should be monitored and kept on-board.
- And finally, those in quadrant four, having high influence and low importance should be kept satisfied and perhaps bought in as patrons or supporters.

Chapter 3 – Identifying Appropriate Stakeholders (cont.)

How to undertake a Stakeholder Analysis

Over the next few minutes you will able to think about the relationships and impacts of the stakeholder within the Later Years Case Study in your workbook.

Step 1: Take 5 minutes to list all the stakeholders you have identified already that could be involved.

Step 2: Now using the matrix, consider where these stakeholders are best placed within the quadrants.

Step 3: Try and place people linked even tenuously to the Case Study across all the quadrants.

Think about how these people may move between quadrants as the programme progresses.

How to use the Stakeholder Analysis

The final step will be to develop a strategy for how best to engage different stakeholders in your programme and you will need to consider:

- How to frame or present a message or information that is useful to them.
- What kind of a relationship to maintain with them?
- Who will make each contact and how?
- What message will they communicate?
- And finally, how they will follow up?

Use a final few minutes to consider on your own or with your group how useful you have found this tool. Consider a time when it would be appropriate to use. How could you use this tool throughout the programme?

To summarise

Phase 1 has described the purpose and context for stakeholder engagement, how to identify stakeholders, the differences between stakeholders and their potential impact on the project or programme.

End of Chapter 3. End of Phase 1.

Transcript

Phase 2 – Engagement Methods

Chapter 4 – Understanding Engagement Methods

There are many different types of engagement and it is important to identify which engagement method would provide the most appropriate feedback from your stakeholders.

Here are some examples drawn from the involvement continuum we discussed in Chapter 1.

- public meetings
- brochures/leaflets
- consultations
- focus groups
- one to one interviews
- surveys
- discussion groups
- user groups
- citizens juries

This is not a comprehensive list, but it describes those most commonly used.

Use your workbook to find the descriptions of the types of engagement mentioned above.

There are many advantages and disadvantages in using the engagement methods we identified to both give and get information and it is important to consider these, taking into account the level of engagement required, the types of stakeholders and time limits when choosing the most appropriate method.

I would now like you to consider when you may use focus groups and what the advantages and disadvantages of this method are.

You may have come up with the following:
A focus group can be used as a means of understanding why people hold the views that they do, it allows them to express their opinions and experiences about certain issues and give their thoughts on service improvements.

For example:

A Primary Care Trust has been evaluating the effectiveness of a weight management intervention and the aim was to hear the views of service users, what had worked well and what improvements they felt would be important in the programme.

Lets think about the advantages

- A small focus group leads to better interaction between participants as it encourages an exchange of ideas
- They can be used as a first step to identify potential problem areas allowing a more in depth analysis to be planned.
- You can recruit people based on certain discriminating criteria e.g. sex, race and age.
- The facilitator can clarify certain points with the participants.
- And they can include people who are unable to read or write.

The disadvantages will include:

- Focus group facilitators require specific training.
- Some people have more confidence than others and may try to dominate the group.
- The wrong mix within a group can cause problems and may not work effectively.
- It may also be impossible to compare information between the groups.
- It can be difficult to improve or establish confidence within a group setting as opposed to an individual interview.
- Focus groups are often criticised because the information collected is based on the views of a small sample, that is, the results are not generalisable.
- The success of a group discussion can also be unpredictable.

Chapter 4 – Understanding Engagement Methods (cont.)

Lets think about when you would use interviews and what are the advantages and disadvantages of this method.

You may have come up with the following: Interviews are used to gather qualitative information and the opinions of those people affected by a particular programme or project, its context, implementation, results and impact.

For example:

As part of a Health Needs Assessment on maternal obesity, a Primary Care Trust conducted a series of interviews with service providers and commissioners to ascertain their views on the current service provision and their recommendations for future improvements.

The advantages of using interviews are:

- To obtain wide-ranging responses to proposals for new services or views of certain sorts of individuals excluded from mainstream.
- They make it possible to get a good cross section of the population and reach specific groups of people for example by using interviewers who speak community languages.
- They're flexible enough to allow new issues to be raised.
- And can provide more detailed feedback than a group discussion.
- An interview can be arranged at a time to suit all concerned.
- Interviewing people in their homes can help them to relax and enable the interviewer to get extra information from observation.
- They are also an independent view can be achieved by using external organisations to do interviewing.
- There useful for obtaining the views of people who might not feel comfortable speaking in a group.
- They can explore sensitive, personal or painful issues

The disadvantages include:

- The fact that expertise is needed in preparing framework so that questions are not prescriptive.
- The analysis of findings from semi structured interviews is time consuming and requires skill.
- Setting up interviews can be time consuming.
- Using external interviewers can be costly.
- Due to differing points of view between the interviewer and respondent there is room for misunderstanding and error in interpretation of responses.
- The views could also be so diverse that it is difficult to analyse the outputs into common themes.
- Responses from interviewees can be influenced by their age, gender, culture or their ethnicity.

We are now at the end of Chapter 4 and we have discussed some of the engagement methods you can use. Further information can be found in your workbook.

Transcript

Phase 2 – Engagement Methods

Chapter 5 – Using Engagement Methods

Part 1 – Focus Groups

What different methods provide

In Phase 1 we undertook a stakeholder analysis to clarify those stakeholders having high influence and high importance in developing services for older people.

We now need to consider the different forms of engagement we can use with these stakeholders within the study:

- By using a Focus Group, Older residents are engaged in focus group discussions to consider what they find most challenging in their lives.
- By using Semi-structured Interviews,: Service providers are interviewed to address the complexities of older people accessing health and social care and how the provision of the services could be improved.

Now let's explore each of these engagement methods in more detail.

Focus Groups – What are they?

A focus group is a carefully planned discussion designed to obtain perceptions on a defined area of interest in a non-threatening environment.

It is conducted with approximately 6-9 people by a skilled interviewer.

The focus group aims to allow a discussion in comfortable surroundings, which enable participants to share their feelings, ideas and perceptions. It is important to ensure a confidential environment, where participants are clear that everything they say will be anonymised. This will maximise participant input.

Questions are directed through a facilitator and captured by a scribe. We will be discussing later in this chapter what types of questions are used and how to develop a topic guide.

One advantage of focus groups is that group members stimulate each other by responding to ideas and comments in discussion. However, facilitators do need to avoid 'group think' emerging – this is a concept that was identified by Irving Janis that refers to faulty decision-making in a group. Groups experiencing 'group think' do not consider all alternatives as they desire unanimity at the expense of quality decisions. Another problem in focus groups could be the 'hoggers' – those people that always have a strong point of view which they get over to the detriment of the other members of the group. If this situation is not properly managed, other members of the group can become intimidated and less active in the discussion.

When to use a focus group

We made the decision to run focus groups as we wanted to find out from the stakeholders what their future needs were and their ideas of how their lives could be supported through more effective service provision.

Focus group interviews should be considered when:

- Insights are needed in exploratory or preliminary studies.
- There is a communication or understanding gap between groups or categories of people.
- The purpose is to uncover factors relating to complex behavior or motivation.
- The group has the 'expertise' in a subject area to be able to inform service planning by providing an insight into what would work more effectively for their needs.
- Or the research needs additional information to prepare for a large-scale study.

Recruiting focus group participants

Having undertaken the stakeholder analysis that we covered in Chapter 3, we now need to consider how to recruit the stakeholders that we identified. There are a range of selection strategies we could use:

- Members of local residents meetings who are active and fully engaged in the community. However, it will miss those that are less engaged who might have equally valid but different points to make. So alternative methods need to be used to find these people.

Chapter 5 – Using Engagement Methods
Part 1 – Focus Groups (cont.)

- Random sampling from an electoral register can be useful, although this is likely to have high refusal or non-attendance rates.
- Nominations from voluntary organisations can often be a successful way to identify relevant stakeholders, bearing in mind, once again, that these are the most engaged members of society who may have a different view from the rest.
- The use of random telephone screening can be used by taking a random selection of names using a telephone directory accompanied by a series of screening questions to determine whether those called match the criteria for the focus group.
- Advertisements in newspapers and bulletin boards are sometimes used, but may produce highly motivated individuals with a certain view that is not similar to other stakeholders.

Preparing the Focus Group Topic Guide

A topic guide needs to be prepared in advance for the focus group, as it sets out the subject areas that need to be discussed.

Topic guides are generally structured with an introduction, which includes a brief summary of the aims of the group, how long it will take and what will happen to data and confidentiality. You can also include an ‘ice-breaker’, which will help to get everyone to speak and to get to know each other a little. You can then place in general questions, which may move to specific questions; and you also need to provide summing up of key points to raise at the end of the discussion.

The topic guide will identify open and closed-ended questions to be used during the focus group. Open-ended questions are those questions which allow for expansion of the subject and require a detailed response, whereas, closed ended questions are those questions, which can be answered finitely either by a “yes” or a “no.” By definition, these questions are restrictive and can be answered in a few words.

Have a look at these questions, they are also in your workbook, and identify which are closed and which are open questions.

Here are the answers.

Prompts

Prompts which are sometimes referred to as probes are also used to encourage the group to expand the discussion to all members of the group. For example:

- Do other people feel the same way?
- Has anyone else had a similar experience?

It is always useful to pilot your questions with colleagues first.

Please turn to your workbook to see the topic guide prepared for the focus group in the Later Years case study.

The facilitator role

Ideally, a facilitator should be an objective person from outside the group or service or, at the very least, someone who is not known to the participants.

The facilitator should be:

- A skilled, objective listener.
- Comfortable and familiar with group processes.
- Able to create and maintain the group’s enthusiasm and interest.
- Informed about the background and expectation of the topic.
- Familiar with how to draw information from people to meet focus group objectives and expected outcomes.
- Able to listen without showing reaction to statements made by participants
- And able to interpret the results of the sessions and communicate those results effectively to the clients.

Facilitator skills

Active listening is used as an approach and the process must be broad in effect, and flexible in timescale. You need to indicate to the participants that they are heard and understood.

Reflecting is a way of demonstrating that you have correctly heard and understood.

Chapter 5 – Using Engagement Methods
Part 1 – Focus Groups (cont.)

- Reflecting feelings – involves hearing the emotion and experience expressed.
- Reflecting thinking – involves hearing the thoughts and beliefs expressed.
- Reflecting meaning – reflects thoughts, feelings or behaviours which are implied.
- Reflecting content – helps to identify key points or themes.

Recording your focus group

The main advantage in recording your focus group is so that the full dialogue, as well as major points offered by the participants, will be captured.

However you will need to remember that,

- You will need to test out your equipment under similar conditions (for instance with a group of co-workers) since some recorders work better than others.
- You may also avoid using the voice-activated feature on your recorder because soft-spoken participants across the room may not activate the device and information will be lost.
- In any event, you should be prepared to rely only on written field notes, in case you experience a problem with the equipment. This is why we recommend having a notetaker during the focus group so you can concentrate on moderating the session

The notetaker's role and skills

The notetaker supports the focus group by taking notes of key topics, quotes, and the behaviours and attitudes of group participants

The notetaker will need to be:

- A skilled, objective listener.
- Able to write or type fast. Note-takers will either type notes on their laptops or write notes by hand, whichever they prefer; and the notes need to be as close to verbatim as possible.
- They also need to be able to pull main points from what they hear. They are not writing a transcript, but must be accurate – not interpreting participants' statements.
- They need to note the body language of participants
- And identifying and capturing good quotes

The note-taker will also ensure that participants fill out all forms and response sheets, if they are required, and will compile all the data from those sheets for the final report.

Here are some tips to think of as you're running the session:

- Aim for equal participation.
- Ensure everyone is respectful of each other.
- Reflect on potential political or personal conflicts before starting the group.
- Devise advance strategies for dealing with these; for example, seating arrangements or pre-group requests.
- Keep focused.
- Maintain momentum and don't get bogged down in particular issues.
- Get closure on particular questions so far as possible.

Running the Focus Group

We decided to use the focus group engagement method to involve a group of older residents in discussions concerning the challenges they face and the support they need at their stage of life.

The following short video highlights key issues that can occur during a focus group session. See if you can identify them.

Voice over: Settling the group: the facilitator must settle the group, ensuring refreshments are offered creating an opportunity for the participants to relax with each other before the discussion begins.

Susan: I'd like to take this opportunity to get you to now introduce yourselves. So just tell us a little bit about from where you come from, you know, whether you know each other that would be good, I think some of you know each other that would be good, i think some of you know each other, its been a lovely, friendly welcoming that we've had today. When you're ready, if

Chapter 5 – Using Engagement Methods
Part 1 – Focus Groups (cont.)

anyone wants to introduce themselves. My names Susan, Susan Short, and I come from the Local Authority, the council. And we've been working with people that work with Chloe from the Primary Care Trust and we're very interested in how you are all coping with later year. so this is what this focus group is about and its actually one of about eight focus groups that are being run across this area. And this is my colleague Chloe.

Chloe: Hi nice to meet you all, I'll just be notetaking throughout the session just names and a couple things of what you're saying.

Susan: We're going to be here for about an hour today chatting through some of the things, some of the events that you're trying to cope with in your lives at the moment. So that's a bit of the background, and now I'd like to ask your permission if we can use a recording device during the focus group if that's OK. So it's just a little recording device that I'm going to put in the centre of the table and it will be on throughout the whole of the meeting. If anyone has any objections. Is that OK with everybody or...

Mary: What will happen to the recording?

Susan: The reason that we are recording it is because we can then transcribe everything and we can use some of the information that we take from the tape recording in our report. But everything will be anonymised, so no one is going to know your name. And your names won't be use in the recording transcriptions at all. But we'll be able to take some really good quotes from you and we'll be able to remember the essence of what the discussions been and of course, also we're taking notes that Chloe's going to be using for the report as well.

Voice over: Expanding the discussion: the facilitator ask questions, followed by prompts, helping to expand an issue and to seek out or offer meaning and examples.

Susan: And it may well be its quite useful if you go back to the services that you've been talking about, that you've been trying to access and just think when you've been having the difficulties. Can you actually think of things that you think, well gosh, you know they could really improve it, it would be so much better if… they could do this that there and the other.

Voice over: What can go wrong?

Susan: Any kind of services really that you feel you need and think about improving.

Mary: Well, I'm caring for a lady at home —

Roger: Yeah well my problem is the busses, the wheelchair, I mean what's the use of getting on —

Susan: I'm sorry, hang on a minute Roger, we've all got a point of view, OK…

Voice over: Dominant participants can cause upset by interrupting and preventing quieter participants from speaking. This situation requires sensitive handling by the facilitator reminding participants that everyone has a point of view

Susan: I'll pick up on what you've said, OK? No thanks, thanks very much.

Voice over: Self-appointed experts also require a high level of diplomacy.

Deepak: I finally get sense of the hospital and I must say, that the consultants were pretty good. I mean, I learn a lot from the consultants there about what's happening and where I'm going.

Tashi: But this is what I think. I think, you know, you have, (I found this from my daughter, with my daughter's help) you have the internet...

Janet: I think you should always go for professional advice, and if you like doing the internet and if it helps you, but check it out, don't just take it as gospel for what they say. I found that this is dangerous.

Tashi: That's why I've come here after all because I'm not getting the help that I want from my GP so I'm trying, I'm trying every resource that there is that I can, that's why...

Voice over: In this case the facilitator accepted the knowledge from the participant but also provided a gentle steer which encouraged other participants to also offer their knowledge and experiences.

Janet: I had to retire but now they've said quite definitely sixty-five so that gives me till the end of the year and frankly I desperately need advice as what I can do to bring my finances up and find out perhaps a bit about insurance and things like that.

Transcript

Chapter 5 – Using Engagement Methods
Part 1 – Focus Groups (cont.)

Nigel: But when, excuse me, but when you were working, didn't you put money away each week, not even a little bit in the post office.

Janet: Have you any idea what its like to be left as a woman with a child to look after. Your husband just goes there is no maintenance after three weeks, no money was coming in.

Voice over: Insensitive participants may also misunderstand another's circumstances and their cavalier attitude can cause offence. The facilitator needs to take time to point out the misunderstanding, seek an apology and ensure that all participants are alright, especially the person who has felt offended.

Nigel: OK, my mistake I do apologise if I've upset you.

Susan: Janet you must... Nigel, thanks for your apology, thanks for your apology.

If you had to pick one factor that you thought would be really important to you out of this discussion that you feel really strongly about, what would it be? So, just want to go around the table again please.

Everybody do you think we've covered everything, has Chloe covered everything in her summary is that OK? Nothing else to say. Alright, lovely, thanks very much then.

Roger: Well, I just want to know, I mean, what are you going to do with all these ideas. I mean, where they gonna go?

Susan: I think that's a really good question Roger. And now what we'd like to do is take them away, take the transcripts off the recorder and take all the notes that Chloe has been making and put them all in to a report with some recommendations, and what we will be doing is feeding back those recommendations to you as well. So you will get a letter from us in the post very soon which will explain, thanking you for what you've been doing and also attaching a summary of all the things that you've been expressing.

Voice over: Closing the session. At the end of the session you will need to: Let people know their comments will be taken seriously and that they will be written up and communicated back to them in the course of the project. Carefully reflect back a brief summary of what was said and be explicit about what will be formally recorded. Thank participants for their time and valuable expertise. Close the meeting.

The focus group demonstrated a number of things that are required and the things that can go wrong during the discussion.

What is required?

There are a number of items that can support the technical delivery of the focus group, can you remember the ones we used?

Here's a picture to remind you.

In addition to the issues we identified, spend a few moments thinking through any other problematic scenarios that you have either experienced or that may occur within a focus group . This will allow you to prepare for all eventualities and think through handling mechanisms in advance of running your focus group.

What to do after the focus group

Immediately after the focus group it will be important for you to discuss with your scribe your reflections on the session that has just taken place. Therefore consider briefly:

- The notes taken by your scribe and make sure they have nothing else to add, this may concern points of clarity on a topic
- Write down any observations you can make about the nature of participation, problems, surprises.
- Ensure that the findings from the focus group are summarised correctly and that any possible bias which may be generated from your own personal views is removed. So that the findings from the focus group are a true record rather than an amalgamation of what the facilitator or notetaker might find important.

Transcript

Phase 2 – Engagement Methods

Chapter 5 – Using Engagement Methods

Part 2 – Interviews

Interviews – What are they?

So we have talked through how to get information through a focus group to inform the Later Years planning cycle. We have also discussed the need for one-to-one interviews as a means of obtaining information through direct questioning.

Remember that interviews can be conducted face to face or as telephone interview. The major difference between face-to-face and telephone communication is, of course, the lack of visual contact. Research has shown that in face-to-face situations communication also relies on non-verbal signals and tone of voice. On the telephone, the tone and rhythm of the conversation is as important as the words themselves.

Informal unstructured interview: Interviewing using an unstructured technique generally focuses on a small number of respondents to explore their perspectives on a particular idea, program, or situation.

Semi-structured interview: Semi-structured interview is more flexible than standardised methods such as the structured interview or survey, and can be used to investigate sensitive topics.

Structured interview: Structured interviewing involves asking each interviewee the same set of standardised questions and allows exploration of a wide topic area.

Planning and undertaking interviews

The following stages need to be undertaken when planning and interviewing, whether unstructured, semi-structured or structured. These are very similar to those for planning and implementing focus groups

- You need to identify stakeholders
- Develop the topic guide
- Then conduct the interview.
- And think about the analysis of the data and feedback.

Interviewing skills

Training people to conduct interviews is important and practice is required to become an effective interviewer. Training needs to address the interview context, sensitive listening, sensitive questioning, judging responses, recording the interview and self-critical review

Here are some tips:

Tip 1: Introduce the topic, explain the purpose and format and confidentiality issues.

Tip 2: During the interview develop rapport with the participant, by maintaining eye contact and not interrupting the flow of response and refraining from expressing your opinions.

Tip 3: Maintain the conversation flow naturally, but don't worry about silences and don't push a person if they don't want to discuss something.

Tip 4: Don't forget the prompts and probes to expand the response.

There is further information on all these tips in the workbook.

Conducting the Interview

You will now see two short interviews. The first one demonstrates how NOT to undertake an interview and highlights a number of things that can go wrong.

Susan: Oh gosh the traffic. Ahh Michael..

Matthew: Matthew.

Susan: Matthew, yes, sorry I'm so sorry, I'm so late. Right so we're going to be talking about Later Years aren't we...

Matthew: Can I just, Can I just check is this being recorded?

Susan: Ah, yeah.

Matthew: I'm not too sure I'm very happy about this being recorded, really.

Susan: Sorry?

Matthew: I, I...

Transcript

Chapter 5 – Using Engagement Methods
Part 2 – Interviews (cont.)

Susan: Oh gosh, you know I haven't got the batteries

Matthew: Would there be any chance I could have a glass of water? Sorry, I've been here quite a while and I'm getting over a cold. Could I like have a glass of water? Do you think I've got a bit of a sore throat, I'm..

Susan: You know, I'm ever so sorry I just drank the last of my water and I don't know I haven't been here before I don't know where the water is.

Matthew: Right, fine. Yeah don't worry, don't worry.

Susan: Oh dear, Have you got a pen by the way? I couldn't borrow a pen could I?

Matthew: Yeah, yeah I've got one here.

Susan: I forgot my pen.

Matthew: Yeah there's one.

Susan: Oh that's nice. You're the Coordinator aren't you for the Later Years...

Matthew: Well I, I take a lead for older people, for frail older people and work around Later Years.

Susan: OK, OK, but um… work for the PCT?

Matthew: Yes I work for a Primary Care Trust.

Susan: Ahh right, OK. Yeah, I'm doing quite a lot of these interviews actually, I'm getting a bit confused to be perfectly honest. [phone rings]. Oh I'm so sorry, I'm going to have to take this. I'm so sorry. [answers the phone]. Hello, yes, Susan Smart, sorry, oh he hasn't has he...

Matthew: I heard you mention you were finishing at half ten. How long is this going to take?

Susan: Oh it won't take long, won't take long at all. No, no no no... trying to whiz though them, I've got about ten of these to do. Integrated care.

Matthew: Hmm, yes, yes.

Susan: Tell me about that. Right..

Matthew: Well integrated care is about when we look at the person's pathway and we look at all the different services and professionals that might be involved with that person.

Susan: And I thought maybe you could um, just put, say a one to ten. If you can just give me what you think is most important and what you think is least important. See, well that will be the most important. Well wouldn't it be? Look, you know, you'd think: oh yeah, well obviously their going to need people to say, i don't know, look after them in their homes. If we put that as number one then? Do you agree? That would be number one...

Matthew: Yeah but how would I know that?

Susan: Well you would know, Harry knew, I mean he put that one as number one in actual fact when...

Matthew: Sorry whose Harry?

Susan: Harry Jones

Matthew: He's my boss.

Susan: Oh is he? Oh he's such a nice bloke. Yeah I was interviewing him yesterday. He actually said that that was more important to the PCT than that was.

Matthew: But isn't this confidential?

Susan: Yeah yeah, of course its confidential, it's fine. So do you want to finish this? Or..

Matthew: Well I don't really understand what you're asking.

Susan: OK, so this is the question, OK. Get, get the interviewee, that's you… Get the interviewee to prioritise the list of services for older people, in your community. So can you just do that?

Matthew: So how is this going to be used?

Susan: Right OK, sorry if you don't mind I've just go to get my coat on there and everything, um basically, what's going to happen is we're going to put all your answers together with all the other people I'm interviewing together and put it in a report and tell the PCT, like that's your PCT, how to improve their services.

Matthew: But I'm I going to be named in this?

Susan: Well no, I mean I'll just put Later Years Coordinator.

Matthew: Yeah, but I'm the only person in that role so they'll know it's me.

Susan: Well, alright, I'll just put Later Years Specialist. Will that be alright?

Matthew: Well, not really because they can identify me and I...

Susan: Do you think you could finish this while I just wrap up here a bit cause I'm really going to have

Chapter 5 – Using Engagement Methods
Part 2 – Interviews (cont.)

to go in a minute cause my kids, I'm so sorry, my kids are waiting.

Matthew: OK.

Susan: If you could get that back to me by tomorrow that would be fantastic. Thank you so much, I'm going to have to run now. You, you just sit there as long as you like, it won't matter at all. I know they won't mind. Its been so nice to meet you. Bye. Thank you so much. Bye.

Matthew: OK.

The interview demonstrated that a number of things can go wrong within an interview.

Let's just remind ourselves what happened

Poor time management: The interviewer was late and showed up looking untidy and out of breath. There was too much small talk before the interview began and the interview ran late.

Being unprepared: The interviewer forgot the interviewee's name, the interview notes were in the wrong order, there were no batteries for the recording machine, no pen, there was no water for the interviewee and the interviewer didn't know where the toilets were.

Inappropriate communication: There shouldn't have been any comments concerning the interviewee's name. The mobile phone call should NOT have been taken, or discussed.

Poor body language: There was little eye contact between the interviewer & interviewee, in fact the interviewer appeared disinterested, not smiling and generally showing impatience.

Inappropriate interview questioning: The interviewer used closed rather than open questions and didn't allow time for the interviewee to respond. The interviewer made assumptions about the interviewee's job, she also interrupted his responses.

Influencing responses: The interviewer began to guide the responses from the interviewee during the prioritisation exercise.

No contact details: There was little explanation about who the interviewer was and no opportunity was provided for the interviewee to discuss, follow-up or contact after the interview.

Lets see how these issues are addressed in the second interview.

Susan: Ah Matthew.

Matthew: Susan, hi.

Susan: Hi, thank you very much for coming, it's very kind of you, do take a seat.

Matthew: Thank you.

Susan: Can I offer you a drink?

Matthew: A glass of water actually would be really good.

Susan: No coffee or tea?

Matthew: No, no just water's fine thank you.

Susan: OK that's fine. Rightio, traffic alright?

Matthew: Oh, bit of a challenge getting here this morning, there's just no saying is there.

Susan: No you can't tell can you really.

Matthew: No, some days are better than others.

Susan: Yeah I got here quite early myself. We've already undertaken quite a few focus groups of a lot of people in a lot of different residential areas.

Matthew: Right.

Susan: And so this is the first follow up really, so this set of interviews are going to follow up some of the issues that have come out of the focus groups.

Matthew: OK.

Susan: So I hope it will prove to be quiet interesting for you. Now before we start, I'd just like to go through a few things with you. First of all the consent form.

Matthew: That's fine.

Susan: If you'd just like to have a look at that, here's a pen... and also that you have no objection to a recording of the interview. Obviously, everything is going to be dealt with confidentially.

Matthew: Fine, so I won't be identified?

Susan: No, not at all. No, no one will be identified, in fact you'll all be coded as service providers.... Well we can start the interview now, and it's going to be for about an hour and it's going to be about ten questions. Alright? Alright, I'm just going to turn the recorder on.

Transcript

Chapter 5 – Using Engagement Methods
Part 2 – Interviews (cont.)

Matthew: OK.

Susan: If I can ask you to not touch the table

Matthew: OK.

Susan: And have you turned your mobile phone off?

Matthew: I turned it off as I came in.

Susan: Thank you. OK. The first question then really is to, for you to tell me a little bit about integrated care, because I know that's something you have been involved in. Could you explain that a little bit more to me?

Matthew: Well, I suppose for me the sort of, I've been involved in integrated care for a number of years.

Susan: Well that sounds really interesting so the services that you're talking about do they fall outside the Primary Care Trust in to the broader community?

Matthew: Yes, it can involve a number of different providers.

Susan: I now like to talk to you a little bit about the barriers in integrated care. So please just tell me what your experience are and perhaps some of the barriers your foresee may occur? So to summarise it, we've been talking about integrated care and joined up working, if you'd like to prioritise those that would be really helpful.

Matthew: So, prioritise from my perspective as being involved with delivering services as what we would see?

Susan: Yes definitely as a service provider… in your role will be absolutely fine.

Matthew: OK.

Susan: I'll give you some time to do that.

Matthew: Fine.

Susan: So, now I have another few interviews to do that will take me a couple of weeks with the analysis. But our aim is to get our report back to the Primary Care Trust and also summarise the key points from that to all those that we've interviewed. Now, are you happy for me to email that to you?

Matthew: So that's, sorry, so that will be emailed in to our draft?

Susan: It will be emailed in draft. We'd like you to very much verify the information and send back. And the other thing really is – we've talked about a lot today – if there is anything else that you think we've forgotten that you'd like to add on, you can actually add it on then to the email, or email me anyway. I hope you've got my email address?

Matthew: OK. We've had some... contact initially.

Susan: We've had some contact haven't we... OK so that'll be fine. Well thank you very much for coming, I've really enjoyed meeting you.

Matthew: Good, it's nice meeting you to.

Susan: I hope you have a good journey home.

Matthew: Thank you. Nice seeing you.

Susan: Thank you very much. And you. Bye bye now.

Matthew: Bye, bye.

What makes a good interview

Here are some interviewing tips:

- Build rapport
- Think about the sequence of questions
- Phrase questions carefully
- Clarify responses
- And thank the informants.

For further details of these points, see the workbook.

This is the end of Chapter 5. We have explored how to undertake both focus groups and interviews. Now we just need to remind ourselves, that good involvement practice: happens early and continues throughout the process;

- is inclusive;
- is informed;
- is fit for purpose;
- is transparent;
- is influential – it makes a difference;
- is reciprocal – it includes feedback; and
- is proportionate to the issue.

Transcript

Phase 2 – Engagement Methods

Chapter 6 – Analysing the Data

The analysis of data from focus group and interview discussions can be demanding, as well as extensive and time consuming. You will need to plan ample time within the project to transcribe the verbatim notes or audio tapes of interviews and focus groups.

Both the focus group discussions and the interviews used qualitative approaches in capturing the data, where learning from other people's experience is the key objective rather than collating and counting numbers as quantitative data. Although the transcripts of interviews and field notes of observations will provide you with a descriptive record, they cannot provide explanations. So you will need to make sense of the data by sifting and interpreting them.

The Analysis Strategy

Approaches used for taking the analysis forward can move between:

- an inductive approach, where categories emerge from the data to a
- deductive approach, where categories are identified in advance and used either at the beginning – these may be categories that are anticipated – or part way through the analysis, as themes are emerging.

There are a number of different methods of analysing qualitative data drawn from focus groups and interviews, although they all identify some general features that are common:

- reviewing all of the information
- organising the data
- interpreting the data
- and presenting the data

One way of thinking about this process, is to consider a continuum of analysis ranging from the mere accumulation of raw data (which includes all responses); through to identifying descriptive statements (looking at the provision of typical or illuminating quotes); and on towards interpretation (which presents the meaning of the data).

Reviewing the information

The analysis begins during the data collection phase and as issues emerge these can influence the collection of further data.

For example, the questions asked during the Later Years case study interviews with service providers were developed as a result of the data collected during the focus groups. To gain an initial sense of the data:

- Reflect upon the most noteworthy quotes
- Identify important themes or ideas expressed
- Identify "big ideas"

Organising the data

It is important to prepare your transcripts for analysis so that all comments are identifiable. Developing codes and themes supports the management of the data. Firstly, you will need to code the units of analysis and then develop themes and categories from the data.

Please turn to the example in your workbook to see data coding in practice.

Using quotes

As you read responses to the same question from, for example, all the focus groups, cut out relevant quotes and tape them to the appropriate place on the large sheet of paper (remembering to write on the source unit). Look for quotes that are descriptive and capture the essence of the conversation. Sometimes there will be several different points of view and you can cluster the quotes around these points of view. The quality and relevance of quotes will vary, resulting in some groups where almost all quotes can be used and some groups where there will be fewer useable quotes.

It is also important to note whether participants group together certain words or expressions in terms of meaning.

If the participants from similar neighbourhoods, under one authority identified a particular domiciliary service then it will open up new themes that can be investigated in the analysis of notes from other groups.

Chapter 6 – Analysing the Data (cont.)

Aims of Interpretation

The potential for a new awareness of the situation has much to do with such factors as how the study was framed, who was selected to participate and the nature of the questions posed.

When you interpret the data you have the opportunity to bring a new level of understanding to the issues discussed. At times the results may point out what decision makers don't already know and at other times the results can confirm earlier suspicions and hunches. Ask yourself these questions to assist with your interpretation:

- What patterns and common themes emerge in responses dealing with specific items? How do these patterns (or lack of them) help to illuminate the broader question(s)?
- Are there any deviations from these patterns? If yes, are there any factors that might explain these atypical responses?
- What interesting stories emerge from the responses? How can these stories help to illuminate the issue?
- Do any of these patterns or findings suggest that additional data may need to be collected?
- Do any of the questions need to be revised?

Also think about:

- What was known and then confirmed or challenged by these focus groups or interviews?
- And what was suspected and then confirmed or challenged?
- And finally, what was new that wasn't previously suspected?

Validating your data

The validity of focus group and interview data is ensured through the comparison of responses from focus groups and interviews of the same type.

For example if all of the older people groups mention the same risks or advantages of domiciliary care, then one can be fairly certain that the information is valid.

If responses are very different, the data may not be valid and it should be double-checked or investigated further.

The data can also be compared with data from the interviews and service provider reports to check the validity of results.

This is called triangulation of data and it means that data on the same issue but from different sources are compared.

Narratives of data can also be used to check validity of data. Although presented differently from group to group the stories may reveal similar attitudes or behaviour with regard to a certain subject.

Report writing and recommendations

As you prepare the report of your analysis you need to be thinking about who are the main audiences for the results. Target groups may include health planners, policy makers, media, potential funding sources and voluntary groups.

You should highlight differences and similarities in perceptions between groups. For example, are the views of older people concerning service provision the same as those of service providers?

The report should contain examples and quotes but not attempt give all the narratives at length. It must address the objectives of the assessment.

It should be as concise as possible and summarise the main conclusions across the focus groups and interviews.

The report with its conclusions must be linked to specific realistic recommendations.

This is the end of Chapter 6 which has covered a brief summary of analysing qualitative data. We encourage you to view the workbook and the references to further explore analysis of qualitative data.

During Phase 2 we have explored how to undertake stakeholder engagement and described the management and analysis of data.

Transcript

Phase 3 – Reviewing Stakeholder Engagement

Chapter 7 – Monitoring Engagement

Monitoring is vital to the success of any multi-stakeholder initiative and provides opportunities for learning, accountability, impact assessment and capacity building

Monitoring is used to assess progress against a plan.

When assessing our progress during the engagement process we need to consider this sequence of events. By using this sequence you discover that some approaches work well with some groups of people and not with others. Some techniques work well with some target audiences and others do not.

If you are running the sort of process that involves receiving comments, don't wait for all the responses to come in before you start your analysis. As they have the ability to inform or change the process.

So let us consider each of these areas again and think about how we can monitor our progress.

By revisiting your stakeholder analysis and asking the following questions you may be able to reassess their contribution and change their participation as appropriate

1. Has anything changed for the stakeholders concerned that could impact upon their interest in the programme?
2. Has anything changed for the stakeholders concerned that could impact on their influence over the programme?
3. Have the stakeholders from the groups you have been targeting changed?
4. Have the priorities of the organisations you are targeting changed recently?
5. Are there any concerns about resources that are new to your stakeholders?

You need to be aware of the stakeholders you are working with, and the fact that their perspectives may have changed

We have discussed many principles for engagement and considered the level of participation that the aims of the programme may require.

To ensure these approaches have been well thought through it will be useful to consider the following on a regular basis:

Be clear about what involvement means, having a shared understanding and ensure adequate resources – money, time, people.

Focus on improvement, demonstrating that you know what the changes are following engagement. Create a system for linking decision-making with impacts. Ensure senior commitment and leadership, and make sure staff are supported and equipped with the necessary skills.

Be clear about why you are involving people. You can clarify objectives and make links to organisational priorities, explaining what can change as a result of their input and what is not negotiable, and use what is already known about people's perspectives.

Involving people also means ensuring that the methods suit the purpose. Make efforts to involve the seldom heard. Be clear about how their views will feed into decision making, providing feedback about the action you intend to take and ensure people have support to get involved.

How do we monitor the techniques we're using?

The following table will help you to identify the impacts of the activities you have been undertaking.

Take a moment to re-consider the techniques that support different levels of engagement.

What about the timing and order of the engagement process?

Think about the following:

Remind yourself of the objectives planned during this cycle of stakeholder engagement.

Document problems or unexpected observations as you carry out the plan.

Ensure you complete the analysis of the data.

Consider what changes are to be made? What needs to happen next?

End of Chapter 7.

Transcript

Phase 3 – Reviewing Stakeholder Engagement

Chapter 8 – Evaluating engagement

Why Evaluate?

Evaluation is not just a single, end-of project activity. Evaluation is an assessment of the impact of a process

Each engagement process should be informed by its predecessors and be able to inform the next.

There are many aspects to evaluation and the following words describe the main descriptions used across many programme areas which can be applied to the stakeholder engagement process.

Effectiveness: the benefits of stakeholder engagement.

Efficiency: the cost of stakeholder engagement.

Acceptability: the social, psychological and ethical acceptability for those involved.

Equity: the appropriate representation of engagement from individuals or groups.

When should evaluation occur?

Evaluation can be undertaken:

Prospectively: has the advantage of ensuring that data collection can be adequately planned into the programme design.

Retrospectively: undertaken at the end of a programme where the outcome indicators need to be assigned.

Who evaluates?

Engagement processes should be evaluated from two perspectives: the organiser's and the participants. Both are essential to determining how successful an engagement process was. Many organisations now recognise the need for involving their users in monitoring and evaluation processes to provide a user focused service.

An Organiser should think about:

- How effective the methods were in eliciting the participant's view
- The usefulness of the responses received
- The level and type of participation achieved
- Costs and value for money
- Learning points for the next time

Can you think of anything else?

A Participant should think about:

- Their understanding of the exercise's purpose
- How easy or difficult they found it to respond
- Whether they felt the process enabled them to express their own views clearly
- How confident they felt that their contributions would be appreciated and used

Can you think of anything else?

The following set of questions for evaluating engagement processes can be found in your workbook. They provide a basic framework for you to work with.

Doing an evaluation is only the first step. The next is to take account of the feedback and make sure the next engagement process uses everything you have learned from the previous one. The aim should be to create a culture of incremental improvement so that every process is better that the last one.

Take a few minutes to consider these questions.

Can you think of anything else?

Once the questions have been considered it is important to be clear about what measures or metrics you will use as evidence that change has occurred.

Measures can be:

Specific indicators – qualitative / descriptive or quantitative /countable. Often a mix is desirable.

Good indicators can help to communicate complex events and outcomes.

Choosing appropriate data requires knowing how the data will eventually be used and who will use it.

Chapter 8 – Evaluating engagement (cont.)

Here are some examples of measures and indicators

In order to assess a multi-stakeholder planning process you could include:

- A quantitative measure which is looking at: Active and sustained participation
- And the Indicator could be: number of advisory group members attending workshops over a six-month period

  or,

- A qualitative measure which is looking at: participants awareness of Later Years issues over a six-month period
- And the indicator could be: change in perspective of carer rights during pre and post interview sessions

Have a go at developing measures and indicators.

Turn to your case study and consider the measures and indicators that would be most helpful in assessing the development of the engagement process.

What do we do with the information we've gathered?

1. Use our observations to inform our practice
2. Feedback to stakeholders in the appropriate formats
3. Document it for internal use
4. Circulate for external publication

End of Chapter 8.

Transcript

Phase 3 – Reviewing Stakeholder Engagement

Chapter 9 – Understanding the Lessons Learned

Learning from action

Whether the aims of the work were met or not, we can always learn from how we did things, and what opportunities there may be to improve our work next time around. It may be helpful to consider a list of 'improvement actions' in an evaluation of the engagement process.

How do we recognise improvements?

The knowledge obtained following monitoring and evaluation can be used to improve the current process and future stakeholder engagements.

Scale of improvement

The model presented here shows a number of improvement activities that range from changes to the existing stakeholder engagement process to improvements that offer complete changes in approach.

We have considered a variety of information and techniques we can use to support stakeholder engagement.

What skills do you think you hold which will help you to get people involved and what skills do you need to build?

Perhaps you would like to make a record of these.

Working to improve our practice relies on the following ideas:

We learn most deeply by linking our ideas and our knowledge with direct experience.

We create new knowledge by testing the insights we develop in the process.

By sharing our efforts we aim to bring about change and promote learning in the process.

We have discussed the differences between monitoring and evaluation, why they are both needed within the engagement process and the need for observation and documentation in order to enable learning and improvement.

End of Chapter 9. End of Phase 3.