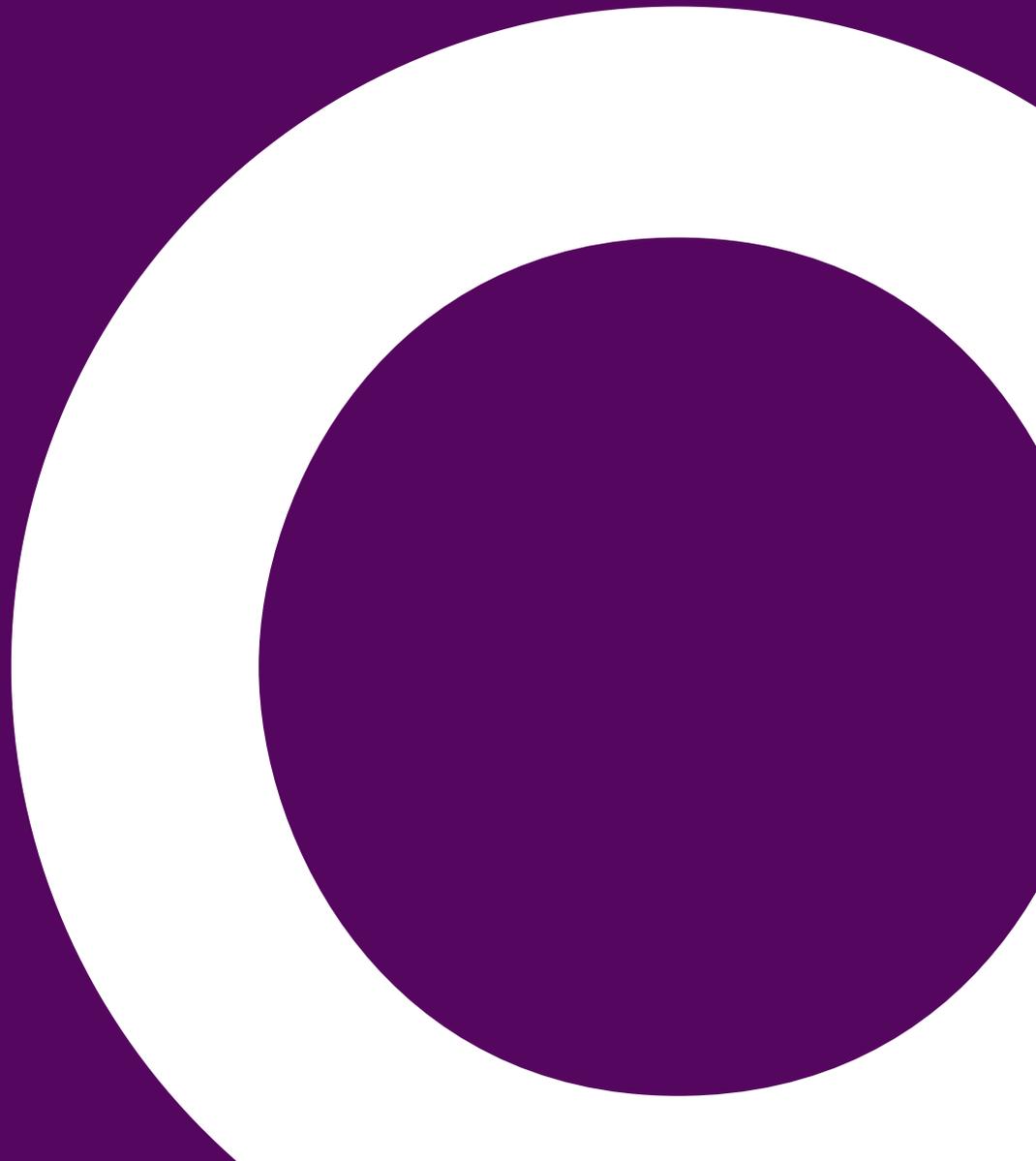


Fostering meaningful engagement

June 2014

THE PARTICIPATION AGENCY



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THE PARTICIPATION AGENCY

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Introduction

At the start of 2014 we found ourselves having a conversation we'd had many times before, about the range of ways people in different organisations view, define and use engagement in their work.

We had our own opinions and experiences, but, as specialists in gaining new perspectives, we wanted to put an ear to the ground and find out what others thought.

Our research took two strands: an online survey, which attracted 70 responses from across the not-for-profit and public sectors; and a series of qualitative telephone interviews to explore the issues in greater depth. Together, the results have raised some interesting points, spotlighted some excellent examples and triggered some important conversations.

Some insights resonated particularly strongly with our team.

There is no shared understanding or definition of terms relating to engagement, participation and co-production...

...but does it matter? We don't think so. In fact, we think this is a strength, in terms of fostering genuinely meaningful engagement.

Context is king. The tools you use, the way you structure your work (or not!) and the terms you rely on during it all should be entirely dependent on the people you are seeking to engage, and the purpose for that engagement. Frameworks must be flexible in order to generate anything other than what you've set out to find.

A conundrum: top-down drivers and bottom-up engagement

The research results highlighted an interesting and potentially risky trend. The decision to engage, and the reasons for doing so are overwhelmingly generated from the heady heights – senior management teams and boards, in most cases. And yet they are seeking to engage at the other end – at the frontline. Can we be sure these decisions are the right ones? How much caution is exercised before extensive work is undertaken based on the needs and opinions of those at the top?

We know that the most valuable engagement is driven, at least in part, by the views of those on the receiving end. They know what needs to change, or what the consequences of change might be. We must be careful not to plan at a distance from people and risk more 'doing to' instead of 'with and for'.

A lot of good work is happening, using many different methods

A significant range of engagement methods and approaches is being employed, and, it seems, delivering some good results for those using them. Respondents referred not only to the more traditional workshops, focus groups and surveys, but also to co-creation sessions, art exhibitions, Open Space events and temporary group structures used to disrupt established hierarchies.

Online mechanisms are being used by many, but some expressed concerns about how best to make use of these without excluding key groups. We think channels and platforms such as Twitter, Facebook, YouTube and LinkedIn can prove hugely beneficial, used in the right place, for the right reasons, and, crucially, as part of the right mix.

Over three quarters of respondents said they are interested in new tools or methods to engage people. Perhaps this could include more participative methods: participatory appraisal, World Café, Open Space, appreciative enquiry, flatter hierarchies, working on strengths instead of weaknesses.

There is an appetite to learn, to develop and to make use of more creative engagement methods, which we welcome. In truth, one of the most crucial aspects of this, beyond simply knowing what your options are, lies in having the confidence to break out of more tried and tested, or linear, approaches, in the first place.



People feel what they do is working but struggle to evidence it

Almost half (46%) of respondents felt that their engagement work was having a 'significant' or 'transformative' impact within their work, which is greatly encouraging, although many also said they struggled to evidence that impact. While people referenced a range of qualitative and quantitative measures, from interviews and policy changes to attendance figures and feedback forms, it seems organisations are struggling to create compelling narratives around the difference engagement makes, and to 'sell' the value internally.

There is some debate to be had over the extent to which detailed evaluation matters. Is it being done to satisfy arbitrary funding requirements, rather than any real need in the provision or fulfilment of services, for example? Is the sense that there is a significant or transformative impact enough? But then, who is getting that feeling, and is it founded? How can funders and commissioners know whether their investment has delivered the return it was meant to?

This is one of the most complex and yet most compelling areas. We feel there are crucial skills being overlooked in demonstrating impact – the ability, for example, to recognise the value of anecdote, and create compelling, meaningful case studies, as opposed to relying solely on standard datasets. There's also the question of tracking the most valuable forms of impact – the long term effects of engagement, and the interwoven nature of follow-up and reaction.



How these insights fit

The themes, insights and challenges raised by this research resonate strongly with The Participation Agency's guiding principles for meaningful engagement, which we believe must be:

- Authentic
- Uniting
- Strengths-based
- Clear on purpose
- Offering the right narrative
- Built on trust
- At the heart from the start
- Followed through

We hope you find the points raised by this research as interesting as we did. If you would like to speak to a member of the team about this work, or any of our services, please do get in touch.

*Almost half (46%)
of respondents felt
that their engagement
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Methodology

The aim of our research was to discover ways in which voluntary and public sector organisations use engagement, to what ends, and with what success, and to explore terminology and future needs.

The research was carried out during January-March 2014. A quantitative survey ran on Survey Monkey and was publicised online and through networks and contacts. There were 11 questions, some of which had multiple-choice answers and some were left open for respondents to comment in their own words. Seventy people completed the online survey.

Over half of respondents opted to provide us with their contact details and several of these people were contacted to request an in-depth telephone interview. As a result, eight interviews were set up and conducted.

This report contains the responses to the quantitative survey, key statistical data, short comments taken from the open questions on Survey Monkey and longer quotes drawn from the qualitative interviews.

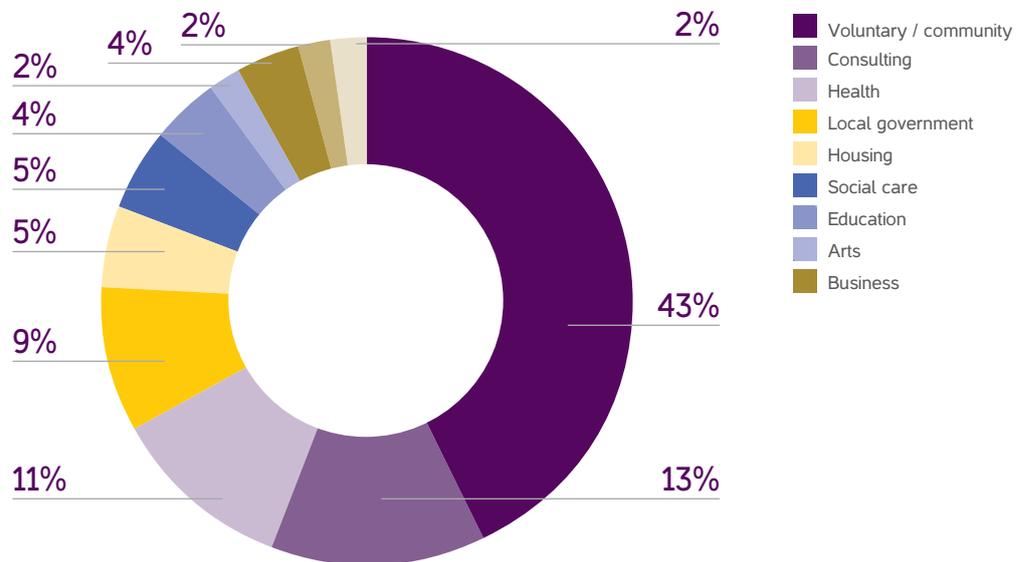
Respondent profile

Towards the end of the survey, respondents were given the option of telling us about their role and their organisation; 54 people chose to respond to this open question.

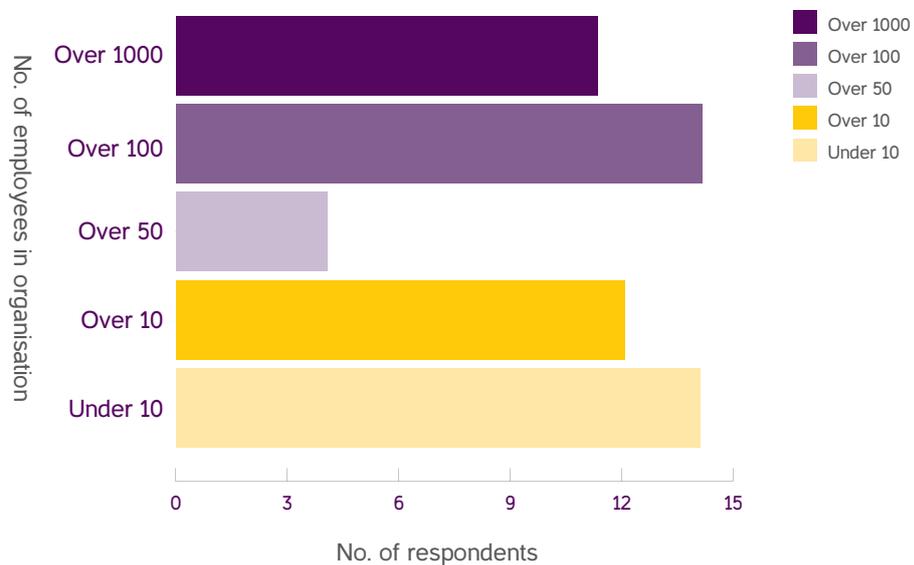
Responses can be grouped together to give an overall profile:

- Many respondents work in voluntary sector organisations, though there is also a significant number from different parts of the public sector
- Different sized organisations are represented, from the very small (fewer than 10 people) to much larger (over 1,000 people)
- A large proportion of respondents describe their role as senior management, though specialists working with service users are strongly represented too

Respondents by sector



Size of respondents' organisation



Role of respondents



Terminology and definitions

Respondents were asked, in an open question, what they understand by the terms 'engagement', 'participation' and 'co-production'. The answers given varied:

Engagement:

- Active rather than passive, requiring user input, harnessing action
- Generating interest, sharing agendas and inspiring reaction
- A two-way process, a purposeful dialogue
- Connecting people, getting them involved
- Getting people to understand and be supportive, gaining understanding
- Working together, coming together, collaborating
- Providing opportunities and support so people can express their opinion and influence decision making

Participation:

- A more active, deeper form of involvement and input
- Taking part, being involved in a meaningful way
- Securing attention and contributions
- Freeing people to contribute and join in
- Ensuring that all stakeholders are actively involved
- Working together, being part of something

Co-production:

- Working together to achieve something, working in equal partnerships
- Designing and producing something together
- Joint effort, collaboration
- Creating something to which everyone has contributed and which everyone owns
- Funders, providers and service users developing and delivering services together
- High-level involvement, power sharing

Respondents were then asked what they see as the key differences between the terms. Some see them as interchangeable, with little to differentiate them. Others see them as a hierarchy of involvement and action, with engagement requiring lower levels and co-production higher levels.

Several see engagement and participation as very similar and going hand-in-hand, whereas co-production is more distinct as it is about power sharing from the start, leading to ownership.

"It is very clear to us as an organisation that this is about two-way dialogue, not a one-way channelling of information. For us, it's 'involvement' (involving people in decision-making, co-production) rather than 'participation' (asking people to take part)."

Luen Thompson, Director of Marketing & Communications, Carers Trust

What drives engagement?

Respondents were asked about what is driving engagement and participation in their work, with six options to select from.



The top driver, was 'organisational strategy / values'



This was followed by 'community representatives or service users'



Next was 'the senior management team / board or equivalent'



Then 'stakeholder pressures / requirements'



And 'government policy'

"Involving people affected by MS is key to the MS Society. We have involvement at our heart, and people affected by MS are keen to be involved in a whole range of different ways."

Ellie Wheeler, Public Involvement Officer, MS Society

Under 'other', respondents' comments included:

- Contracts coming to an end
- The evidence of benefit and the need to manage reduced resources more effectively
- Local authorities, health & wellbeing boards, CCGs
- Networks

"It's all down to the type of organisation that we are, everything we do is some form of engagement. Partnership working is core to all that we do, whether that be public and private sector; or public and public sector partnerships."

Jane Batchelor, Communications & Marketing Manager, Community Health Partnerships

What are we trying to achieve?

Respondents were asked what they are trying to achieve through engagement and were given 10 options and invited to tick as many as they wished; they could also opt for 'other'. On average respondents ticked five options.

- The most cited aim, selected by 83% of respondents, was 'better relationships with service users / communities / stakeholders'
- This was followed by 'better / more appropriate services / activities / products' (selected by 79% of respondents)
- Many also chose 'insight to inform a new / revised strategy' (60% of respondents) and 'establish greater understanding of what we do' (60% of respondents)

Respondents were also able to add their own comments under 'other'. Here, responses included:

- Ensuring our research reflects the priorities of our members
- Increasing internal confidence
- Improving quality of life for service users
- Helping us prioritise projects
- Promoting empowerment
- Informing service providers of the needs of service users

Respondents were asked who they are focused on engaging and were again given a list of 10 options from which to select as many as they wished; again, they could also opt for 'other'.



Under 'other' several respondents added:

- The general public
- Opinion formers and policy-makers
- Businesses

"Engagement is a big part of my job as all of it is about partnership - I bring people together to talk about things they wouldn't normally talk about - commissioners talking to practitioners, for example."

Gary Alessio, Manager, SE London Sexual Health & HIV Network

Methods and approaches

Respondents were asked an open question about the methods or approaches they have used to foster meaningful engagement. A variety of answers was given, but there were some common themes and tools:

Meetings and conferences:

- Discussion groups, structured team meetings, one-to-one meetings
- Workshops, focus groups
- Open meetings in community centres, public board meetings
- Meetings between service users and staff, for example to redesign services
- Co-creation sessions, for example to come up with stakeholder maps
- Meetings where agendas are formed by participants

‘One current client has gone from strength to strength with staff engagement in innovation work, following their staff conference which I ran using Open Space, which opened up their organisation to fantastic cross-fertilisation across the various teams.’ – Survey respondent

Surveys and questionnaires:

- Interviews, face-to-face consultation
- Service audits, user requirement research
- Employee engagement surveys
- Postal, online, email and telephone surveys
- Petitions, citizen science surveys

Events:

- Open Space and World Café events
- Facilitated ‘join-in’ events
- Road shows, community events
- Face-to-face work with service users
- Creative arts events and exhibitions
- Information stands

“We hold regular public meetings, as well as deliberative events and county-wide focus groups. At our public meetings, we cover a ‘hot topic’ – often something raised by a member of the public.

There is no problem getting the public involved.

We also have the involvement of other public services, and of voluntary and community sector organisations, which makes an enormous positive difference.”

Bill Ronan, Community Engagement Manager, Kent Council

Organisational or structural:

- Patient or service user forums
- Beneficiaries or service users becoming board members
- Committees with delegated powers, formal scrutiny committees, decision-making panels
- Specific roles with responsibility for engagement
- Staff development and away-days, online learning forums and 'inspire-ignite' days to introduce new ideas
- Temporary group structures to disrupt traditional hierarchies

'We have three service users employed by our charity which I think makes the user involvement aspect more authentic.' – Survey respondent

Communications:

- Regular contact with key stakeholders
- Creation of bespoke communications channels, newsletters and e-bulletins
- Two-way communications through social media, online forums
- Ensuring projects are well publicised, sharing and celebrating successes
- Articles in the media
- Encouraging all to contribute to debates and express views
- Using plain English
- Creating content such as info-graphics and film

Several respondents commented on the need for the overall approach to be appreciative, positive and solutions-focused, as well as the importance of good facilitation. A number indicated the value of promoting a variety of ways for people to get involved.

Many commented that methods depend on who the organisation is engaging with. Points raised included the need to be context-specific, flexible (in terms of days and times, for example being open to run events at weekends), relevant to audiences, and fun.

'Interactive methods – collaboratively designed by all stake-holders. Regular, frequent, sustainable commitment – this has had a transformative impact.' – Survey respondent

'We want a long-term user engagement strategy. Methods are useful, but the key for us, we believe, is working out who to engage, on what, over what length of time.' – Survey respondent

Making engagement meaningful and valuable

Respondents were asked what they think has the most impact in making engagement truly meaningful and valuable. They were asked to select three options from a list of 12.



of respondents selected 'valuing people's expertise and experience'



of respondents selected 'being prepared to follow up on outcomes'



of respondents selected 'being clear about exactly what is expected or possible'



of respondents selected 'working to find solutions through collaboration'

"Especially with fewer resources - the kind of redesign we need to do to provide services with fewer resources, we can't do by sitting in an office - we need to get out and talk to people. It's about honest discussions rather than blank pieces of paper simply asking people what they want. You have to offer people alternatives, to prompt wider consideration. They haven't always thought of what's possible because they only know what they know. You need to plant ideas on how things could be different."

Gary Alessio, Manager, SE London Sexual Health & HIV Network

A handful of comments were added that highlighted the need to thank people and to let them know what has changed as a result of their involvement.

Barriers to meaningful engagement

Respondents were asked what they think are the most significant barriers to meaningful engagement and were asked to select three answers from a list of 12.



of respondents
selected 'lack of
budget'



of respondents
selected 'lack of time'



of respondents
selected 'a focus on
short-term results'



of respondents selected
'people's reluctance to
explore alternatives to
the status quo'

Under 'other', comments added by respondents included:

- Lack of knowledge, skills and confidence internally
- Lack of staff buy-in, staff resistance
- A problem with people being 'over-consulted'

"There is a lot more to be done, to foster effective engagement. For example, there are other public sector organisations that are required to roll out community engagement, but they are struggling. However, they have not come to us for help. The silo mentality is holding us back. A multi-agency approach would be great, especially as resources are becoming more pressured."

Bill Ronan, Community Engagement Manager, Kent Council

Measuring and demonstrating impact

Respondents were asked what impact they think their current engagement practices are having within their work, selecting just one option.



of respondents said
'some impact'



of respondents said
'a significant impact'



of respondents said
'a transformative
impact'



of respondents said
'a low impact'



of respondents said
'no impact'

People were invited to provide further details and examples, which over a quarter of respondents did, highlighting ways in which they evidence impact:

Internal impacts:

- Service users employed in the organisation or delivering training
- Better team camaraderie
- Identification of change champions and advocates
- Leaders stepping back and work teams being coached into leadership
- Insights applied to branding and positioning of the organisation

External impacts:

- Tangible changes in services
- Changes in government policy
- Awards won

'Through bringing everyone back consistently to the common purpose we have been able to identify change champions and advocates, those who sit on the fence but can be moved, and the stalwarts. We are now re-prioritising our efforts to where we can maximise outcomes with limited resources.' – Survey respondent

"The impact has been felt within our main community, in the form of more active relationships between staff and members.

The voice of people affected shapes our work more: materials are reviewed by users, users are sitting on panels and steering groups, for example."

Arlene Greene, User Involvement Manager, Parkinson's UK

Some respondents, however, highlighted difficulties in evidencing impact:

- Some things are working well, but improvements are possible
- Some pieces of work have had a significant impact, others have had little – outcomes should be more consistent
- For the effort involved, outcomes are hard to evidence

The next question asked respondents how they measure the impact of engagement within their organisation or their work. This was an open question, so a range of answers was given covering both outputs and outcomes:

Quantitative measures:

- Survey and questionnaire response rates
- Feedback forms and satisfaction surveys
- Number of events, numbers attending events
- Number of people involved in activity, numbers taking action, new volunteers
- Incoming enquiries
- Number of press releases, media coverage, social media interactions
- Level of donations
- Comparative studies
- Online analytics
- 360 degree appraisals

Qualitative measures:

- Talking to users
- Interviews and case studies
- Informal, qualitative narrative
- Positive outcomes against objectives
- Policy changes

'User engagement with our product is critical to its success. We measure this using online analytics weekly and through talking to our users.' – Survey respondent

'We do an annual impact assessment of our resident involvement work which looks at cost and impact. Also surveys to determine changes in views over a period of time. Case studies on service users to determine the impact of particular interventions and analysis of take-up of services after promotional campaigns.' – Survey respondent

Many respondents said they find evaluation difficult and do not believe they have the right systems in place. Indeed, 20 people skipped this question, suggesting they were unable to answer.

Others highlighted the problems caused by poor evaluation, the challenges they face and the efforts they are currently making.

"We are in very early stages of trying to sort this out."

"This is one of the problems and one of the barriers to 'selling' these concepts."

"Would like to do it in a more structured way but it's a question of time / capacity."

– Survey respondents

The future of engagement

Respondents were asked how they think engagement will develop in their work and in their sector over the next few years. Comments made paint a mixed picture, with respondents expressing their hopes, but also some of the challenges they expect to face:

- Engagement will be taken more seriously, increasingly seen as the thing to do to improve things
- There will be more collaboration and combined services
- There will be a shift to co-production in public services
- It will be increasingly important in influencing decisions and accessing funding
- It will bring the public and decision-makers closer together
- Cuts and financial pressures are a driver, but also a challenge
- It will develop slowly, with many pressures on time and resources
- We need to demonstrate its effectiveness for it to develop
- As it develops, we will need to balance engaging the many while staying responsive to the individual

'I hope co-production will be the default method for the design, delivery and monitoring of public services.' – Survey respondent

'With the new public health trajectory underpinned by health promotion, I believe that engagement is, at last, being taken seriously as a health-giving human imperative.'
– Survey respondent

The way engagement is done is expected by many to evolve:

- There will be less reliance on surveys
- Online engagement will increase, though there are concerns about people who are digitally excluded
- There is great potential for user-generated content
- It needs to be culturally relevant and use appropriate methods, which requires further segmentation and analysis

"Engagement within our own organisation will become more and more targeted and strategic. On a general level, more and more will be done in partnership so people will need to become increasingly sophisticated and spend more time 'engaging' whereas they may before have worked just within their team or organisation. There will be far greater cooperation between organisations and across sectors, which is very much what we're already about."

Jane Batchelor, Communications & Marketing Manager, Community Health Partnerships

The final question asked what might be of interest in the future, with respondents selecting as many of the nine options offered as they wished.



of respondents said
'new tools or
methods to engage
people'



of respondents said
'help with developing
more creative
engagement methods'



of respondents said
'being part of a
learning network'



of respondents said
'understanding the
evidence under-
pinning engagement'



of respondents said
'help in evaluating
my engagement
methods'

"I'd be keen on more ways to connect with and learn from others doing involvement and engagement in other organisations, and also in learning more about evaluating impact."

Arlene Greene, User Involvement Manager, Parkinson's UK

About The Participation Agency

Meaningful engagement and genuine participation allow people to identify issues, be involved in solutions, have a voice and influence decisions that affect them. It is the only way for organisations to have an authentic dialogue and truly understand those connected to them and their work.

The Participation Agency is passionate about using creativity and innovation to unlock the power that lies in staff, volunteers, service users, tenants, communities and customers.

We have extensive experience in developing strategies, creating and delivering campaigns, changing services and helping organisations and communities to evolve, as well as undertaking participatory planning and evaluation projects.

For more information on our work, visit www.participationagency.com or call us on 020 7697 2987

Three partner organisations make up The Participation Agency:

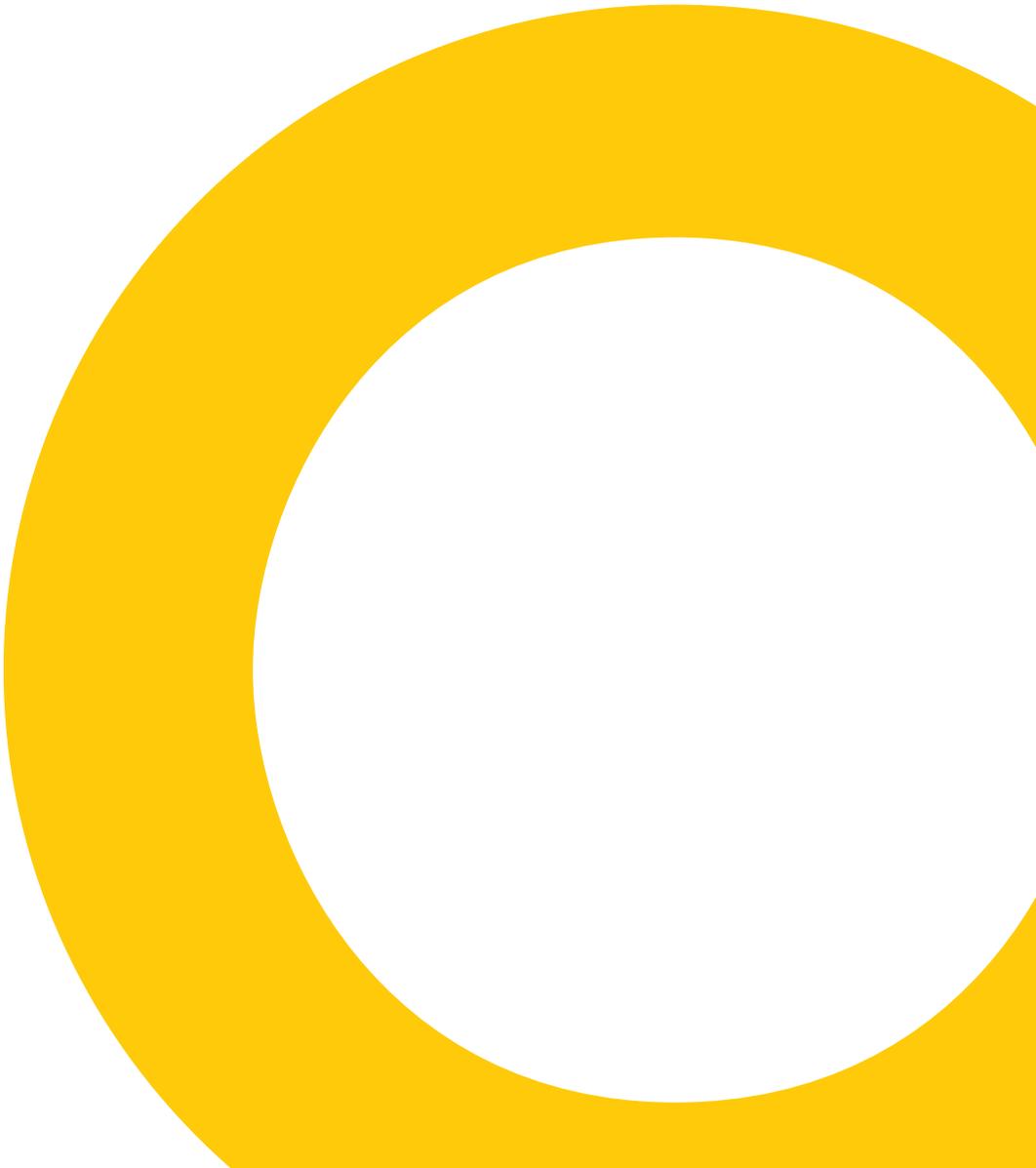
PublicServiceWorks: www.publicserviceworks.com

Amazon PR: www.amazonpr.co.uk

Tap Arts Project: www.tapartsproject.co.uk



Notes



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