

Guide to the *Consumer Engagement Tool Kit*

Overview

Consumer or client engagement has been increasingly researched, promoted and implemented over the past decade. In the delivery of health or community services and often for new initiatives it is considered a normal occurrence to actively seek client input into service planning, implementation, monitoring and evaluation; at times it is required, even mandatory.

This is mirrored by personal experiences, at work, in our broader life, where being involvement, being asked, being considered gives a sense of ownership, control, community and team spirit.

It also instills feelings of being empowered, being cared for. Research and discussions surrounding the 'social determinants of health' further attribute good individual health and wellbeing to these aspects and qualities.

The shift from client consultation toward a more continuous flow of client engagement is a reflection of these genuine and individual needs; the need for care and love. At an organisational or community level the benefits of enhanced client engagement are often associated with:

- Improved service delivery and service outcomes; and closer to clients' needs;
- A promotion of wellbeing outcomes; including confidence, self-esteem;
- Increased staff job satisfaction;
- Increased client satisfaction;
- Improved documentation and learning from client, staff and others' experiences;
- More client engagement can lead to a client's entry into other areas of learning, participation, contribution, etc.
- Enhanced organisational learning and growth in the direction of best practice;
- Becoming a leader in the field of client engagement and being recognised as such;
- Demonstrating to clients and a wider community an active and pro-active interest in being responsive to client needs and to continuously re-agreed levels of care.

The 'Tool Kit' consists of the following 7 components:

- 1. Guide to the Tool Kit:**
... these two covering pages;
- 2. Project Planning Tool**
This tool is intended to assist you in the planning of your client engagement activity: defining aims and purposes, who to involve to achieve your project's aim(s), etc.
- 3. List of Engagement Tools & Resources**
Familiar and less familiar consultation or engagement tools are introduced. The additional provided list of resources is intended to inspire you to be innovative and if, appropriate, to try new tools. New tools or input may generate new levels of impact, new results. The resources may also assist in applying existing tools in different, more appropriate ways.
- 4. (Project) Self-Monitoring Tool**
This tool is intended to prompt you, your team at set intervals to meet for discussions, assessment and documentation reviews. Also to assess activities are effective, capture key events and outputs (outcomes) while you implement your engagement project.
- 5. Sharing of Experiences/Stories**
The guide has some helpful hints on how to go about capturing the experiences of clients, staff, etc. and in turn it may also assist in the documentation of your project and, through stories captured, in offering personal and individual insights into your project's impact.
- 6. Peer Support Group**
Peer support is what we naturally lean towards or do ... we talk to a mate at work for advice, debriefing, etc.. This tool is utilising a peer model offering a structure in the form of a peer support group to assist with specific aspects of the project or overall; while hopefully also enjoying time, creativity and supportive meetings with a colleague or friend.
- 7. Gantt Chart**
A Gantt Chart is a tool that is frequently used as a project management tool. You can adapt the chart included or search for a more suitable version. They are helpful to monitor projects with multiple stakeholders, overlapping tasks and varying timeframes.

Project Cycle

* To identify your project please use the HACC Client Engagement Model 2010; for example model element 2.3.

- A further tool to assist is the *Organisational Self-Assessment and Planning Tool for Consumer and Community Participation* (April 2003).

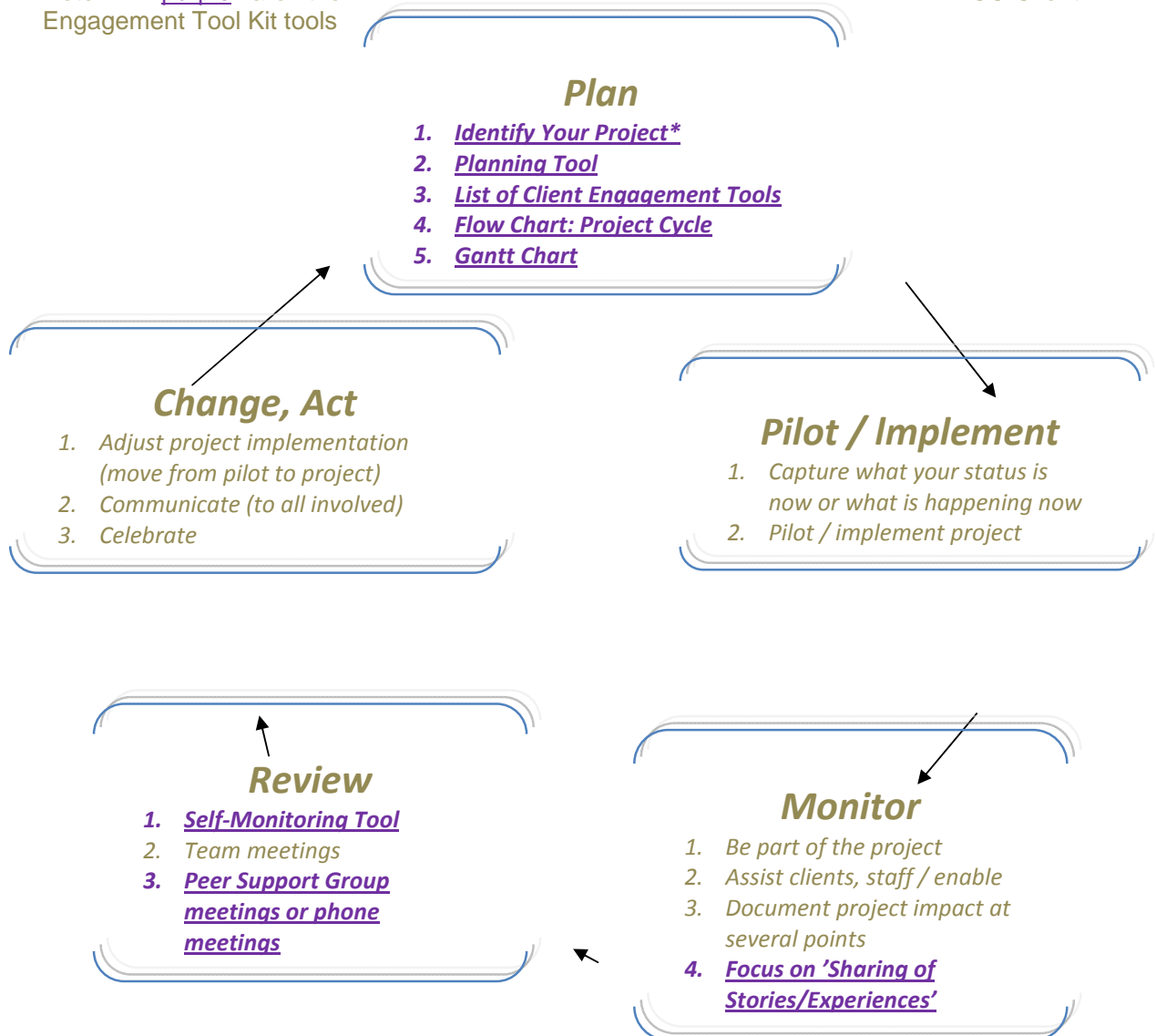
The following chart illustrates the project cycles, where and how the Tool Kit can be applied and what else to consider as you plan and move:

- Through an optional pilot project of your planned client or consumer engagement activity
- Through the project (directly or after the adjusted pilot project phase)

Please consider involving staff, volunteers, client, carers, etc. at every stage of the cycle

Note: in purple are the Engagement Tool Kit tools

HACC Client



Client Engagement Project - Planning Tool

1. **Client Engagement Model Element** [insert the number and abbreviated name of the element]:

2. **What is the aim/purpose?** [define your organisation's clear explanation of why you are doing this project and what you envisage will be achieved at its completion]

3. **What do you anticipate to be the outcomes for all involved; in general, during the project's different stages and by engaging others?**

4. **Relates to the area of** [insert the specific area(s) or sections of your organisation and the wider community affected by the project]:

5. **Who do you need to consult with / engage to implement this?** [insert key support persons or groups to assist with the project, including clients, a champion, etc]

6. **How will you implement this [work plan]?** [insert a brief description of (1) the key strategies, activities and engagement methods or tools;

7. **Who will do what and at what time?** [insert a table of strategies/activities who is responsible, who is or should be involved and when is should be completed]

	Activity	Who	Who to involve	By when
1.				
2.				
3.				

Notes:

8. **How do you plan to measure the results?** [Insert any forms of measurement or tools to capture results, while the project progresses and at completion. E.g. pre- and post interviews with clients/staff, questionnaires, record stories shared, etc.]

Please also consider:

- What level of participation – at planning stage and overall - are you involving clients at? (individual, program whole of service)
- What mechanism do you have for feeding back information to project stakeholders, including consumers?
- How are you going to ensure engagement form diverse consumers and diverse voices?

List of Client Engagement Tools

The following list is a sample of client or consumer engagement tools that you can use to achieve your project aim(s). More detailed resources listed below offer additional information and guidance in how to use the tools and what to consider when applying a tool with particular client groups.

A. Tools

1. Peer support groups
2. Steering or advisory group
3. Monthly social/recreational events
4. Open studio nights for artistic expressions
5. Workshops
6. Book discussions
7. Support groups for family and carers
8. 1:1 peer mentoring
9. Letters
10. Questionnaire
11. Suggestion box
12. Creative writing (poetry, short stories)
13. Group discussion
14. Working in small groups
15. Working in pairs
16. Question and answer session
17. Visual art, design, drama
18. Drawing
19. Photography

B. Using technology

20. Internet tele- or video conferencing / phone (Skype, Oovoo)
21. Online survey
22. Blog
23. Social networking
24. Ratings and voting
25. Using Digital TV to reach people
26. Touch screens
27. Web-site run in collaboration with a voluntary action group
28. Engaging carers through (free) Skype or Skype conference chat or call

C. Additional helpful resources and links

- www.healthissuescentre.org.au/documents/detail.chtml?filename_num=226537
- www.healthissuescentre.org.au/documents/detail.chtml?filename_num=226706
- www.iap2.org/associations/4748/files/toolbox.pdf

If you don't know where to start ... conducting this service/organisational self-assessment will assist in identify client engagement need or priority areas:

- <http://www.healthissuescentre.org.au/documents/items/2008/05/208317-upload-00001.pdf> (actual tool is on pages 10-27)

For more ... please go to:

- www.healthissuescentre.org.au/publications/library.shtml

Sharing Your Stories / Experiences

The following are pointers to make your client engagement project work for your service. To appropriately document and share the experiences of your additional activities allows others to hear about it and to connect to the changes or improvements to the services, etc.

After you planned your project, selected appropriate engagement methods or tools, it is equally important to plan how to capture the project's 'before, during and after' qualitative information.

The sharing of client or staff stories or experiences have shown to be particularly effective. Not only do they show a situation or change, they also have an impact on a wider environment. It is used to better understand the experiences of different players or participants of the health care or wider health care system; and in particular the clients.

The sharing of a story or of experiences in a health or relate service setting is also an accepted research method referred to as 'narrative enquiry'. The aim is to share a personal story or experience... to tell a story, which in turn allows others to learn from the essence of the story.

What to consider ...

If you are the project facilitator/manager:

- Develop your own sharing guidelines and share them with clients, staff etc. e.g. for the sharing to be authentic, objective, for the story to be 'as it is' or 'as it was' or 'as it happened', etc.
- The following questions may assist: how was it (the situation), how is it now and how has this activity or additional effort effected you?
- Focus on the feeling part of the client/subject's experience: how did you feel before, during and how are you feeling now?
- Encourage or help anyone telling or documenting a story to be relaxed and to be natural.
- Encourage or help the sharing person to write the story down; or find to document it that suit the client e.g. record or video tape it, ask for it as a poem, a song, etc.
- Stories shared can be both, positive, unexpected experiences or difficult ones (see below 'the troubles' in a story are important) ... Share what was being done, what is in place now that perhaps is helping others too.
- Share the story with the aim to feel the feeling again (versus the emotion .. the deeper, perhaps coarser feelings) The first ones is much more likely to touch people and generate compassion and support ... the 2nd one will draw people in, involve, generate more emotion yet without necessarily the depth of wanting to help, assist, share in the story and feeling.
- Trust in the story. Told with feeling, from the heart, the story will affect, touch others. There is no need to add, to be 'dramatic'. Share how it was & felt, the sequence will be very 'powerful'.

If you are the person sharing (client / staff / carer, etc.):

- Story telling / sharing ... tells / gives a sequence of events
- Also helpful ... what is others interpretation of the story
- Story "should" be Sequence of events: what happened to who, what were difficulties/obstacles, what was done, the outcome of that, what was learned
- Write it as if you share it with a dear friend ...
- Some points that may be useful in writing / sharing your story:
 - Good stories have an element of 'trouble' in it, what went wrong (real / perceived)
 - What happened, what were the turning points, what was the outcome that makes a better (overall) outcome?
 - What did you make of it, what did it mean to you?
 - Did something unexpected happen, unusual, some form of trouble/challenge ... and what was the response to it, the outcome, the learning, the evaluation.
- Story telling / experience sharing ... is a research method and a sound management or service delivery tool. It helps us / the provider / others: to understand people / clients better and it also helps to understand what do clients understand themselves.

Self - Monitoring Tool

A tool to assist reflection, action and documentation about what worked well, what didn't and what did you do to achieve your aim/s ... and to communicate it / share it with clients, staff and a wider community.

The larger 'self' is ... clients, staff, stakeholders, carers, board, management, community, etc..

	Project Period
	No.: (e.g. week no)
1. Strategy, activities, tools utilised [as per initial plan or additional; list:]	
2. Documentation of key events or activities	
<ul style="list-style-type: none"> • What did you / others do – describe: 	
<ul style="list-style-type: none"> • what happened - describe: 	
AND	
<ul style="list-style-type: none"> • seek descriptions, stories, experiences from others: clients, staff, etc.. 	
How were activities, etc documented: (briefly outline)	
<ul style="list-style-type: none"> • Any activities that were solutions from previous self-monitoring? 	
3. Issues arising [new issues; general ones or project related]	
Actions to be taken: (e.g. for peer group discussion, staff or client meeting, etc)	
4. Next steps [list another agreed or necessary next steps or actions]	By when or ✓
5. Who to inform, engage, share with [list]	By when or ✓

Peer Support Group

Background

Peer support groups combine peer learning, mentoring and coaching. This can be used to meet your client engagement project goals.

The purpose is to stay focused on your project and to assist each other with ideas, strategies, general encouragement or support.

One very helpful 'ground rule' of a peer support group is: *all relevant information, discussion and challenges shared remain confidential and within the group*. Project related information etc. can be taken to the project team. Each group member agrees to this.

Process

1. Forming:

- Form groups of 2 – 4 members (can be more, max 6) & arrange a first meeting
- Prior to your first meeting determine your organisation's 'client engagement project'; base it on one or several items of the model.
Please consider: your project's aim(s), deliverables, activities, who to involve, engagement tools to be used; how to measure your progress and how to document it.
- Discuss your project with relevant staff in your organisation prior to 1st meeting. Enrol others, seek input and support.
- When you meet 1st and subsequent times, you can each discuss your project.

2. Norming: next 1-2 weeks

- Attend your group's first meeting
- Meetings can be conducted face-to-face or by telephone (or a mix)
- Establish the group / meeting rules and the pattern of meetings
- Each of you need to discuss your project in terms of your planning for it/implementation and how you plan/do self monitoring, recording of outcome, stories shared, etc..
- Also discuss challenges, learnings and signs of successes, etc..
- Also seek practical advice and useful questions from other members
- Take notes of actions agreed or committed to & discuss them at the next meeting.

3. Supporting:

- 8. continue Peer Support Group meetings to November or as needed.

Other comments / group foci

- 9. Each group member learns from peer advice and questions, and by reflecting on their own actions.
- 10. Each group member identifies useful actions to take between meetings.

Meeting Format Example:

- A. 1. Opening (about 5 minutes); 2. Briefly review your peer support group values and ground rules; 3. Each member comes prepared with at least one project issue to discuss or get help with.
- B. 1. Members support each other (usually 10-20 minutes each); 2. include equal time slots for each member
- C. 1. Members describe their issue, seek advice, questions or comments from other members; 2. outcome: select realistic actions to take before the next meeting.
- D. 1. Closing (about 5 minutes): share their learning to other members; 2. briefly evaluate the meeting; 3. verify details of next meeting.

