Shifting attitudes to mental illness.

# Giving Voice

## How to meaningfully involve people in the work of your organisation

*"We will work towards creating a society where people of all ages do not experience stigma and/or discrimination on mental health grounds, and enjoy the same rights as other citizens."*

*Shift's mission statement, 2004-2011*

# Introduction

Mental health is sometimes described as an 'invisible' condition. Unlike, say, having a broken leg, a mental health problem may not be obvious to others. This makes it very important that people with direct experience of mental health problems have a say in policy and service development. Thankfully, it is now accepted that new policies and new services must meaningfully involve people with direct experience. We are no longer invisible.

The knowledge in this document comes from our experience of working together in Shift. Throughout this document we will include direct examples of our experiences of meaningful involvement. It is by no means the first word or the last word on the subject. However, it does offer insight and a good starting point for people and organisations looking to take advantage of the skills and knowledge of the people who use services.

### Who are Shift?

Shift was the Department of Health-funded programme to tackle the stigma and discrimination surrounding mental illness. We ran from spring 2004 to spring 2011. Shift sat between Government, public bodies like the NHS and the third sector, and also was tasked with building and maintaining bridges with parts of the private sector. In addition, since 2007 Shift has been part of a Memorandum of Understanding between the Department for Health and Time to Change, the anti-stigma campaign run by our partners in the charity sector.

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# Foreword

Another day and another worthy document lands in your in in-tray asking to be read. So why read it when the day is busy enough as it is?

Well, we offer three reasons:

## Because it's good for your organisation

When decisions are based on good information they are likely to be good decisions. If you give the people who directly or indirectly use your services the appropriate time and space to work with you, they will provide the intelligence you need to run things efficiently. Some may call this type of work social marketing, co-production or out-reach, we call it meaningful involvement. Whatever the language the central meaning is the same – you need to see the whole map in order to plot the best route.

## Because it meets your policy responsibilities

We list some recent and/or more important documents in the appendix. They all direct public sector organisations to work with their communities in a meaningful, as opposed to 'tokenistic', way. When they are taken together, the message is clear that the insight of people who receive services (and/or have a stake in how the services are delivered) is essential for decision makers to be able to make the right decisions.

Although this is now a long-accepted principle, it is now supported by more detail and guidance about how these insights should be captured and worked with. One-off public consultations and one-way consultation exercises do not capture the relevant information, nor do they enable a two-way relationship which allows the appropriate development of decisions to occur.

## Because it's good for you and the people you work with

Taking decisions that affect others without giving them a meaningful opportunity to take part is morally wrong because it removes their individual power to affect what happens to them.

# The Stages of Meaningful Involvement

## Part One: What is Meaningful Involvement

TIP If meaningful involvement was easy it would be more frequent. It involves compromise, listening to things you don't want to hear, being patient and being well organised. Today's fast-paced work environment can make the time required to do meaningful involvement hard to find.

However, nothing affects the bottom line more than bad decisions. Bad decisions are often based on a lack of knowledge. Stakeholders, including people who use services, offer a wealth of knowledge and experience.

The six stages below show how involvement can range from tokenism to meaningful participation. Not every involvement project should aim for levels five or six – that may not always be practical on grounds of time or resources. However, for projects that have a planned life of three years or more, or that are part of a local organisation that will be providing services to a population for a long period of time, we recommend that planners look to achieve level six and have a clear plan of the stages that they need to take to get there.

### Stages of Involvement

1. **Information -** General information is provided to the individual who uses services about the services, policies and practices with no formal opportunity to respond.

2. **Consultation** (Passive) - Opinions are requested about the services, policies and practices, but no response is given, so people are unclear as to whether their views have been heard, understood, or acted upon.

3. **Consultation** (Active) - Opinions are requested and responded to. This may involve an individual response or a document that brings all the responses together. It would make clear where opinions had an effect on the final SPP.

4. **Influence** - The next stage brings people face to face all stakeholders face to face. The opportunity to discuss issues, over a period of time, with those who directly provide and receive services, enables everyone to increase their understanding of other points of view.

5. **Partnership** - Partnership describes the situation where frequent communication takes place and working relationships have been built. A much wider range of information is easily available to all contributors. Advisors are consulted on all the important issues and are comfortable describing the relationship with providers as a 'partnership.'

6. **Control** - The final stage of meaningful involvement is when the decision making power is shared. Key decisions cannot be made without the agreement of advisors. This describes true partnership working as both providers and advisors share responsibility for the final outcome.

## Important Factors to Consider

Involvement is not meaningful if it is one-way, passive, short-term or viewed as an add-on. A decision is usually stronger if a wide range of views has been explored. It is also usually beneficial to 'take as many people with you' as possible and this can be achieved through involvement at an early stage. The outcome to avoid in any involvement exercise is 'tokenism.'

It can be beneficial to 'recruit' advisors before or at the same time as staff as this can help both groups 'bind together' as they set off on the journey together. See part 2 of this document for more information about building the right team.

Meaningfully involving people who have opposing views is not always straightforward and disagreements and negative outcomes may sometimes arise. Therefore it is good practice to think this through in advance and have procedures or agreements in place with regard to how negative and/or disruptive contributions will be managed and develop criteria that can be used to filter and place the views in relation to the objective. We give some ideas in part 3.

In order to recruit a wide range of people you will often need to use a variety of communication methods. Some people are happy to take part in small or large meetings, others prefer to communicate by writing or email, some people's preference might be for telephone consultations. It is also worth considering the tone and style of engagement, sometimes a formal, business-like approach is appropriate. However, a more informal and social environment can often produce a more open exchange of views which aids creativity. Finding out people's preferences and 'comfortableness' is an important first step in meaningful involvement.

Thinking through the whole cycle from beginning to end can also be a useful exercise, especially from the point of view of managing expectations. Sometimes an involvement exercise starts with the best intentions, but finds itself unable to keep up with people's demands for feedback, more involvement, etc. Part 3 talks about setting the right tone.

Being able to sustain involvement is also worth considering from the start. It might be the case that the involvement wanted is fairly short-term. However, generally the people who want to be involved in supporting the work are worth staying in touch with and this will require some resource – even if it is only regularly phone and email contact. Part 4 talks about how the group may change over time and part 5 discusses how to manage the end of a project.

> *"Being one of fourteen has reduced the pressure I might otherwise have felt, especially as it has not always been possible for me to attend meetings or events. Meetings have been chaired well. Learning to share the space with others whilst at the same time finding some of my own has been a positive experience. It's not always easy but working with mutual respect is easier when people work together rather than within the unhelpful dynamic of "us and them."*
> *AS*

# Part Two: Finding the Right People

*"The most memorable group activity was being given an hour with our group to produce a performance of our nursery rhyme set to music. This was enormously successful in getting us to work together as well as removing any nerves we might have. As a former manager I was considerably impressed by the amount of time given to this selection process, the thought which had gone into the tasks, the high profile venue and the care which was taken to alleviate the fears of candidates who had had long term mental health issues.*
*LS*

There are a number of things to consider when setting-up a group of advisors to work on a programme. Some of these are as relevant to the more disparate practice of consultation. The experience of Shift, and those of us who worked on the programme, includes the following:

## Deciding who to involve

The first part of the process is to decide on the values, characteristics, skills, experience, etc. that you think will be required to undertake the work. This will apply to individuals but also to the group. If you are recruiting a group you have more flexibility around which individuals you choose as others in the group can make-up for any shortfall in skills or experience. The values and/or passion for the subject are usually universally required - skills are easier to pick-up along the way.

You then need to devise a process which will enable you to discover if the individuals who are interested in undertaking the work meet the requirements. The time-honoured way of doing this is to ask people to complete a form and attend an 'across the desk' interview, but there are other ways. When recruiting a group of advisors who share a passion for improving people's quality of life a job-interview approach may not be able to bring-out the passion and the set of skills required for team working.

The process used by Shift was fairly unique and, although many organisations may find it hard to replicate, we think it is important to pick out some of the thinking involved. The Shift project wanted people who would be good communicators, who would generate new ideas, be good at navigating obstacles and be passionate about the challenge. Based on these criteria a day was set-up that involved elements of performance and group-working to show how people worked together.

**Representativeness**
Is the candidate representative of a larger group? What type or size of group needs to be represented? The greater the number of people that can be involved as advisors the more likely it is that a wide range of views can be heard. Is the individual regularly in contact with other members of a group that they can feedback to and represent? Do they have previous experience of being a representative? If so has their history of involvement affected their *representativeness*?

**Passion and outlook**
Individuals can possess relevant experience and skills but without the drive their involvement will be less valuable. Linked to people's passion is their outlook. Many people are passionate about a subject but their driving force is negative, based on things that have gone wrong. Others will be driven from an idealistic stand, always looking to how things should be in an 'ideal' world. The pragmatist is somewhere in between. In a group situation it can work well to have a balance of all three perspectives.

**TIP**

**Advertising –** It is important that your call for help is heard by your target audience. Reaching people who are currently linked to your operation is relatively straightforward. However, if you want to involve people who have used services but have now left, or people who have never used your service, advertising will require more thought. You also need to ensure that what you describe will appeal to the right people for the right reasons.

*"Candidate service users and carers had to make a presentation on a personal interest using their own medium of communication – one man played and demonstrated the drums, another showed a film on distance cycling, some orated, some created interesting PowerPoint presentations. We were then given a range of tasks which involved creative drama, singing, dancing-all focusing on mental health topics. The day served to forge strong links between candidates with each gaining knowledge and appreciation of the talents of other contenders.*
*SP*

## Other issues

**Pay**
Pay is one way of showing how that person, and their time, has real value. It also clarifies the contract between those offering the money and those receiving it. Not everyone will want to be paid and people's commitment to a cause is not only related to their pay. However, when people's contribution is central to the overall objectives of the project, they should be paid.

It is essential to be clear early on about payment and working conditions. Pay should not become a barrier to people working together. In any group some people will take more of an active part than others. If this is partly motivated by pay, the situation needs to be managed sensitively so as on the one hand not to restrict people's motivation for the work and on the other not to demoralise people who see others more highly rewarded.

Another issue is different pay for different tasks. This can be appropriate and link to other pay schemes in the organisation. However, as above it can lead to advisors wanting to only undertake the well-paid tasks and create internal competition that can be harmful to the group ethos.

**The timing of recruitment**
Generally staff are in place before the search for advisors begins. This has the benefit of allowing the staff time to 'prepare the ground' set-up processes etc. for how things will be run. However, this can create a bias and begin an 'us and them' divide. If a group of people are to share the same house and a few move in early and re-arrange the furniture, others may not settle so comfortably.

In the case of Shift, the staff team arrived after the advisors and, although not planned, we felt that this lead to a more balanced relationship as the ownership of the project was shared. The programme staff were not involved in the recruitment day and therefore did not 'choose' the advisors to fit with any set of criteria owned by the programme staff. Again this meant that staff had to perhaps put in more effort to build relationships and negotiate the direction of the programme rather than be able to strike out and hope to be followed.

A third approach would be for the programme staff and advisors to be recruited at the same time. For those of you who are at the start of the process this way may be worth considering as it brings values like equality and partnership to the fore and therefore builds a strong foundation for a new project.

*"If it is a new organisation, I think it is important that the carers and service users are appointed at the same time as contracted staff to ensure that they are seen as equal members. There is a danger that if they are appointed later, staff will have 'bedded' in and will have less time and inclination to accept them on an equal footing. For existing organisations it is important that mangers who are going to have involvement with the carers and service users are part of the selection or induction process – they must believe in the value of the appointments.*
*TH*

**Team characteristics**

It is difficult to recruit a group of people who will instantly gel into a composite team. A team has to develop and everyone needs to find a way to accommodate themselves with others. Some ‘character types’ to bear in mind might be:

- researchers (people happy to seek information and ‘translate’ it);
- organisers (objective and logical);
- team workers (good at working with others, motivational and supportive);
- specialists (dependent on the technical are of work people with specific skills/ experience);
- finishers (people who tend to focus on delivery, conscious of the objective and the resource limitations);
- promoters (people who can talk publicly and deliver the messages face to face).

> *“Up until Shift, my experience of service user recruitment had been “We’ll take the first volunteers”. I had always interpreted this very negatively as “None of you able to make a meaningful contribution, so it doesn’t matter who is selected”.*
>
> *The Shift interview demonstrated that the recruiters were serious about the process and that there was real work to be done. It also showed me that I was able to survive in that formal situation and there were real people out there who thought I had something of value to give.*
>
> *Later on, when the staff members started to work with us, there was a sense of equality that we had all competed and succeeded in being recruited: staff and advisors.*
>
> *RW*

# Part Three: Early Working

> *“Once the team were in place, the Programme Lead called me to discuss areas of interest. This initial conversation made it easier in the first meeting where the size of the group could have felt overwhelming. Knowing there was further opportunity to share my views by telephone or email helped me to remain engaged and feel valued. AS*

**Finding the right tone**
The first interactions with the group will make a strong impression. Initial exchanges are likely to bring to the fore the importance of the task, the responsibility on the advisors and the pressure on resources.

The chair of the first meeting should aim to verbally and non-verbally communicate the key values and principles that will underpin the work. A few useful points to consider for the first meeting are:

(1) ensuring everyone around the table is in agreement with the presenting need for change

(2) stating that the meeting will operate within a small set of principles, e.g. everyone will have the chance to speak and to be listened to, people are free to speak their mind but equally will listen to opposing views, that if people are initially offended to not over-react and allow people time to explain and understand as this is a first meeting and we are all finding our way.

(3) reminding the group that people will have a further opportunity to communicate their views after the meeting via telephone or email

(4) and stating that the group has the responsibility of drawing-up its own set of values and principles and eventually process of how meetings and other engagements should be undertaken.

It is important not to be too prescriptive as this can blunt creative thinking and put up barriers for people to rail against. This is particularly important in circumstances where people have had different experiences, have different skill sets, and be emotionally connected to the issue, where a more open and flexible approach to working is best.

TIP **People first –** Every member of the group will have a common reason for being there; their motivation to reach the objective. In relation to this they will also have a key attribute that connects them to that objective, e.g. they may use or work in the service that is being reviewed. However, it is important for the group to work that everyone relates to everyone else as people first and their attributes of professional/service user as secondary. You might find it useful to focus on other factors to manage the discussion or when setting-up working groups. Attributes such as hobbies, work experience, family role and skill sets have less political and/or emotional power attached to them and can therefore enable the group to form common links and bonds rather than strengthening ‘in’ and ‘out’ group memberships.

**Language**
Words can have a powerful emotional effect when they are associated with particularly strong feelings and some subject areas have difficult lexicons consisting of words that have particular political and/or emotional triggers associated with them. This can make if very difficult for people to communicate effectively as the additional meaning ascribed to the words by the listener can have an effect unintended by the speaker.

Mental health is a case in point where words may have added ‘political’ power reinforcing historical relations between all-powerful doctors and much less powerful patients. Words like ‘patient’, ‘user’ and ‘sufferer’ can have a very disempowering effect when used to describe someone. In Shift we made an effort to find out how people wanted to be identified and what words and phrases caused offence. The way that we managed people’s responses, i.e. by talking through what people meant and understood by the words used, helped us on the way to becoming a team because finding a resolution was an achievement.

**Developing working methods and processes**
Every manager and organisation has their own method of working and preferences for certain processes. Generally these will be based on the management of employees rather than consultants, advisors and volunteers.

Flexibility and patience are important. Successful meaningful involvement does not mean that managers have to discard their favoured way of working, just that they should take a step back, find out how the rest of the group wants to be supported, and would best be supported (not necessarily the same). By starting with small processes, the group can gently agree on a process – and also to experience the process of coming to an agreement. More difficult processes, such as looking at how decisions will be made, or the process for asking someone to leave the group, should be left until later.

**Time and space**
When pressure is applied to time, people may find it more difficult to make the right decisions. When pressure is applied to space it makes people uncomfortable and less able to function effectively. A common mistake is to expect that decisions need to be made very quickly within a limited time frame, and also holding meetings in an inappropriate room (e.g. with no daylight, accessed by walking through hospital wards, too noisy, overlooked by other staff). It is important to see things from the advisors point of view; how will they feel if the meeting is held here? how long will they need to access the information, ask questions, understand the implications, test out some assumptions and arrive at a position?

To do things properly, time and space need to be given major consideration. If either are outside of your control then it is important to be clear with management that expectations of the best outcome will need to be readjusted.

TIP **Seeing the same picture –** When working with a group it can be helpful to create a shared context to work within. This can be produced in a number of ways e.g. as a written document, an audio or visual record or simply a spoken description that everyone hears together and are able to share. At a simple level this can consist of a summary of the history of the issue making clear the main characters, ideas, dates, places etc. that are relevant. A guide to the language, jargon and acronyms is also important, especially if the subject is specialised. Over time you will need to provide clarification, repeat elements that have been forgotten and indeed factor in the new history that is being written by the group.

**Effective communication in meetings**
There is a whole subject of study that examines the group dynamics, psychology and tactics that occur in meetings, and chairing meetings where there is a strong emotional interest can be particularly difficult. If you run things too formally you risk high expressed emotion that can be disruptive, erring too much the other way can result in the meeting drifting off topic, or even descending into chaos. Therefore it is important to remind people that in order to allow everyone to express their views there is likely to be some interruptions and possibly some comments that may be felt to be rude or offensive as people's emotions affect the ability to filter every word. However, by allowing a little bit of 'elbow-room', the meeting can flow and people will feel that they have been listened to, that the engagement was real, and that progress had been made.

**Having frequent breaks**
Allowing time before the meeting for people to settle and after the meeting for people to 'wind down' can also be important to managing emotional levels and ensuring that people are comfortable and relaxed to be productive. Some people can find it difficult to 'hold onto' a thought until it is their turn to speak. For this reason and others it is often advisable for the Chair to enable people to raise issues before and after the meeting that did not get the chance to be aired in the time allowed. A meeting does not necessarily finish when everyone leaves the room.

**Providing support**
There are various forms of support that should be considered when setting-up an advisory group. They include: communication; personal; and transport. In communication terms this may mean considering access to staff via telephone, use of email and the ability to access the web and being trained/supported to use associated technology and tools, as well as opportunities for face to face communication outside of meetings. Personal support also needs to be taken into account, being aware of advisors' physical and mental health and being clear about what support can and cannot be provided, e.g. providing for people's spiritual needs with a quiet room. There are also transport needs to enable people to visit projects, attend meetings, meet with other advisors etc.

**Our experience**

At Shift it was decided that a certain amount of communication would be via the internet because of the geographical spread of the advisors. We set-up computers for those that did not have them and spent some time showing people how to use the software and tools. Apart from this type of practical support there is also personal support to consider. Although staff involved in working with advisors on a project may not have this type of support formalised in any job description it should always be assumed that any activity that involves working with a group of people over a period of time will require some emotional support. We all go through periods of feeling 'down' as well as 'up.' Sometimes this will be linked to the work, e.g. a frustration at funding being reduced after development plans have been agreed. When that happens people may require reassurance, re-focusing, or some 'time-out'.

*"Being part of a larger team had its advantages. There were more fish in the pond to get along and work with and more life experience in the group to learn from or identify with.*
*AS*

**Matching personal goals to programme goals**
Programmes can achieve a high factor of efficiency if the goals of an individual are intertwined with the programme. It can be helpful to clarify at an early stage (once the group has 'bedded down') what development outcomes members might be interested in and to see how these may fit with aspects of the programme. For example an advisor may want to develop their skills at public speaking and the programme may require representatives to visit partner services and tell them about the project. Fitting tasks to interests is likely to increase effective involvement.

**Managing emotional and personal agendas**
It is impossible to require a group of people who are passionate about a subject, and who have been asked to take part in a programme that aims to have an affect on those issues, to leave their personal agendas at the door and become objective commentators. Therefore it is advisable for all to accept that there are subjective and objective arguments being made and all should be aware of this and where possible, identify their standpoint. The Chair's role will be to try and be as objective as possible to allow the other contributors to talk freely from their personal viewpoint if they wish to. It is also important to calmly phrase opposing 'devil's advocate' questions and enable others around the table to recognise the different viewpoints. Part of the development process that a group will go through is seeing issues that they are familiar with through the eyes of their new colleagues.

**Dealing with disagreements**
Although at the start of new project people may plan for a consistently happy and united group, the reality is usually different. It is therefore sensible to be prepared for differences so that they can be effectively managed when they arrive. Hoping for the best is not a reliable approach.

Because the host organisation is dealing with an individual (or individuals) who are outside of a traditional line management structure, managing the situation can be very difficult.

Differences can be: personal (some individuals do not like each other, "She's just rude!") methodical (people have different views about how to reach their objective, "he's going about it the wrong way") ideological (different values and politics, "You cannot treat health as a marketplace") or skills/experienced based ("They don't have the ability to carry this off", "They're too young to remember that this didn't work before" "They're living in the past".)

Whatever the root of disagreement, the first attempt to bring the group together should be to focus on what is held in common. Primarily this is the project objective, if that is still in place it is worth moving on to the next stage. However, if there are serious questions raised about that then the group may have to eject those that disagree and consider replacing people. A next step in building consensus can be reminding the group of the other things it has in common. This could be a good time to have an away-day or a team-building session where everyone is involved in an activity that is not central to the issue. By taking these steps the group can build some foundations that will hopefully withstand the next round of talks where the controversial issue is discussed. Often the outcome wanted is that people will see that for the good of the whole project it is better to compromise and, if necessary, agree to differ and move on.

The process of identifying that differences exist and to understand them supports the development of mutual respect. As people spend more time together, they become able to base interactions on a better understanding of people's character, beliefs and values. This makes communication more effective and support much easier to offer. Where people's characters do not 'fit' and/or their beliefs and values are different, we can adapt in order to preserve the focus on the common objective.

From our experience at Shift agreeing to disagree was a useful construct to have in place early on. It enables everyone to 'move on' and not devote too much emotional energy and time to the disagreement.

**Formal v Informal**
A framework that is too prescriptive and directive can stifle creativity and energy. Alternatively one that is too liberal and open-ended can lead to confusion and a loss of clarity of purpose. Some groups contain a number of 'difficult to manage' elements and the formal rote is required to keep order. Other groups are able to form bonds of trust and operate with mutual respect that allow them to work with very few rules governing their behaviour.

**SHiFT... Our experience**

Shift started slowly due to funding and staff appointments running over schedule. It therefore suited us to have an informal and flexible approach to setting-up the Expert Advisor group. Once the logistics were clearly in place there was the opportunity to formalise our process. However, as we had all become comfortable with the initial way of working we decided not to change. Over the ensuing years there were times when decisions could have been made sooner had we adopted a more formalised route. However, in retrospect we feel that taking the extra time to discuss and reflect meant that all in all better decisions were made and the group was able to stay together for longer.

**Advisors' power**
Some advisory groups and involvement processes are unclear about how decisions are made. Initiatives sometimes raise expectations by suggesting that people's views will influence or even be responsible for, shaping decisions. Later on in the process, when it becomes evident that this is not the case, the initiative will break down and advisors will cease being part of the process. It is therefore very important to be as clear as possible about the role of the advisor and how decisions will be made. As the group and the work develops, and perhaps as personnel change, the decision making process will change, so things cannot always be set in stone at the start. However, it is important to be open throughout about the decision process.

The role of an advisor is different to that of a decision-maker. The former has more freedom to be creative in thinking of solutions to problems. They can help the decision-maker by stretching some of the boundaries and throwing-up many alternatives to be knocked down. The decision-maker is constrained by the political and resource implications and without advisors can only make decisions based on limited options.

Both roles are necessary in good decision-making.

**What can and what cannot be done**
New programmes can be burdened with unrealistic expectations from people inside and outside the organisation.

The sooner all parties agree to a version of reality that is realistic the better the outcome will be. Operating under raised expectations applies pressure to the programme and those working on it as well as setting-up commissioners, politicians et al. for a fall should things fall short. All the members of a programme will benefit from clarity about what is within their power and what is not. When this is understood the group can concentrate on what can be done and not get distracted by what cannot. Effective projects are able to prioritise the audiences and issues that they feel they can make a change in and leave those which are likely to be less productive.

**A direct line to the boss**
It is important in the early stages for advisors and the programme lead to build a meaningful relationship. As well as allowing a free flow of information, direct access helps to demonstrate the importance of the advisors to the programme. Once communication has been established both parties can maintain a meaningful relationship without it necessarily taking up a lot of time. If the link is not established, or if it becomes broken later on, people could feel less-valued and disenfranchised. From the Programme Lead's point of view the loss of independent voices from the front-line will limit their intelligence and therefore have a negative effect on decision making.

**Reinforcing Involvement**
People are more likely to feel part of something when they commit time, money or some other resource. An advisor that attends meetings, expresses views and then is not involved again until the next meeting months later, can become divorced from the programme. They may also have a feeling of needing to 'start all over again' at the next meeting. By identifying opportunities for advisors to be part of the delivery of work, either as an advisor or a contributor (even if it is at a relatively low-key level) can greatly aid the progress to meaningful involvement. Also linking advisors to related programmes, where wanted and appropriate, can keep people closer to the programme as well as expanding their opportunities for development.

**Taking time out**
There will be times when an advisor will be unable to attend a meeting, not have time to comment on a report or attend a launch or conference event. If there is only one advisor this can leave a big hole in the meaningful involvement exercise. Where there are a group of advisors this is less of a problem for the programme but it can mean that the individual 'misses out.' If they are unable to make a second meeting or event the situation can become compounded if programme staff over-look the individual when the next opportunity for involvement comes around and/or the individual not actively following opportunities up.

It is worthwhile reassuring advisors at the outset that the process is flexible enough for them to be away from it for periods of time without losing their status. Options for communicating with other advisors and staff when it is difficult to physically attend meetings can also be explored. If reasonable adjustments can be made the programme will be rewarded by contributions from people who are valued and supported. At Shift we made it clear from the outset that people could take as much time out as was necessary to manage their life and be able to return at the same level – i.e. they would not be 'demoted.'

SHiFT.. **Our experience**

Given the geographical spread of the Shift expert advisors the internet was to be a key factor in helping people to communicate. Email access was relatively straightforward, except that it is a time consuming process to read through 14 sets of comments on one document. Therefore we set-up some pages on a password-protected website that used 'wiki' pages that allow people to edit documents so that others can see the changes (like 'wikipedia'.) Minutes of meetings, papers for comment and conference reports, could all be placed on the relevant page so that advisors and staff could comment collectively and see each others views. It also acted as a notice-board for advisors to post up information about their own activities. This is a far more efficient method of commenting on papers electronically compared to email.

However, it was a new skill for all staff and advisors and to this day not everyone is comfortable using it. Although new technology will provide efficient solutions, it cannot be assumed that everyone will be able to benefit in an equal way. With dedicated time and resource spent on training and support greater confidence in outcomes can be achieved. However, in reality it is advisable to not rely totally on new procedures and be able to offer alternatives. It is also practical to bear in mind that not everyone will comment on everything all the time.

# Part Four: Joint Working

> *“Shift has been very successful in helping to develop a strong sense of a ‘team spirit’ and comradeship amongst the advisors. This is partly due, in my view, by not having regular ‘general meetings‘ of the group. The genuine friendship, which has evolved, has been brought about through meeting advisors on specific initiatives; i.e. the employment working group or attending a Shift stall at a conference. Working with Shift I have realised that the ‘main’ group only needs to meet once a year, as the real bonding takes place outside of this gathering.*
> *TH*

After a period of time the ‘honeymoon’ comes to an end. The first major disagreements may occur – not necessarily internally but possibly externally with funders, other organisations, or the target population. Or this might be when the first challenge fails and a new route has to be taken or when an initial success creates a new pressure for the group. Whatever the reason, a turning point is reached where the group will either progress by learning from the experience and becoming stronger or by getting stuck and breaking up.

Over time advisory roles can develop. The group will become more aware of what it is capable of, having learnt from the experience of success or failure. Advisors will often want to develop their role to fit with their increasing knowledge (and the increased functioning of the group) and become more involved in delivery. For example they may develop a set of proposals and become involved in sharing these with the public via staffing stands at conferences, running workshops or plenary presentations.

In projects and programmes that develop over a period of years, people originally brought in to advise may become involved in producing and delivering specific tasks. Involving advisors in delivering work will blur the objectivity around their advising role because they now have a direct responsibility in relation to delivery. This should not present an insurmountable difficulty as people are usually able to ‘wear different hats’ and are able to function independently. In practice it is a common development that the barriers set-up by definitions like professional or advisor will eventually breakdown as the group evolves by solving problems and undertaking tasks. Sharing the roles is often a symptom of this development.

It is important to recognise these developments and communicate that everyone needs to be aware of such role changes and monitor what this might mean. Some people may do too much and exceed their remit in terms of undertaking new work. It is normal for people to exceed boundaries when they are working in new areas, and this is often how clear boundaries are formed. The group will need to develop a process that enables advisors to clarify with the right person whether tasks that they are contemplating are appropriate.

> *“I was regularly kept abreast of developments and invited to key strategic meetings and seminars where my views were taken on board. This was particularly relevant as Shift was developing information and resources about tackling stigma within BME (Black and Ethnic Minorities) communities. Alongside other advisors I had an input into making suggestions and carrying out early scoping work with the director who eventually produced an award winning short film. I was able to develop a relationship with the director and support him in the work.*
> *HB*

Reaching a new stage or level also offers the opportunity to look back and learn lessons from the past to see if things need changing. It is worthwhile taking the time to go through key milestones with the group to identify the key decisions and experiences which led to previous productive or negative outcomes. Any changes that you and the group then wish to make should be impact accessed against what else has changed in the external and internal environments and what the next objectives are. One frequent development is that a large general group divides into smaller specialist ones as targets become more precise and skills and experiences are managed in the most efficient way.

**Moving from inclusivity to exclusivity**
In the initial stages of involvement it is common to welcome all contributions to aid the 'binding' process. This enables people to make their contributions and be part of the whole. It also allows boundaries to be stretched and set. However, as time progresses some things will need to be excluded, for practical purposes and efficiency if nothing else. This can require some careful balancing from the Chair so that on the one hand progress towards specific outcomes can happen while on the other the whole group stays on-board – even if their contributions have now been dropped.

One message to communicate clearly to the group at this stage is that in order for the final decision to be made everyone's input was required. Individual ideas and proposals that have not stayed the course will have served their purpose by providing a context within which the successful proposal could me measured. When group members are able to drop their own ideas and compromise with others it is a clear sign that the group is moving towards working in partnership.

> *"On my original CV I had stated that I was a creative person and was keen to become involved in specific creative projects. I was invited to sit on a working party to develop three employment videos. This involved reviewing the scripts, the draft videos and also having access to the writer. I have no doubt that I and the other advisors made a real difference to the out come and contributed to their final success.*
> *TH*

**Measuring and rewarding success**
It is vital to pause and celebrate success when it happens and to ensure that people involved are meaningfully rewarded. Organisations now make more decisions in less time than previously which increases the pressure that people work under. Rewarding success is partly about taking some time out to release the pressure.

Recognising people's work and rewarding their effort is important for a number of reasons: it supports progressive personal development; it provides a 'boost' to future work; it can help bind a team together; it reinforces the commitment that the staff/employer/project is making to the advisors, and; it marks milestones around completed work. Rewards can take the form of some time out away from the workplace, well chosen words at a meeting, a social event after work or something more imaginative. Whatever the method chosen it is essential that it is presented 'from the heart' and not rushed.

**Keeping informed**
It is essential at this level of joint working that communication to advisors includes:

(a) decisions made following their advice,

(b) regular updates concerning the project, and

(c) relevant information relating to related projects, programmes and policy.

Not all advisors will want or need to know all there is to know, however they must be told about key developments (active communication - the responsibility of the programme) and be able to access the other relevant information if they wish (passive communication - the responsibility of the advisor.) There are a number of ways of achieving this: printed or electronic newsletter; update sections at all meetings; and/or updates posted on the web. A regularly updated core script can be particularly helpful as it provides an update but also is a tool for members to confidently communicate the correct messages to others. Active communication does not just mean the one way 'giving' of information. For the communication to be successful the sender needs to ensure that it has been received and understood.

*“One particular project required the advisors to meet up with senior managers from various government departments. We had to try and persuade them use our mental health resources within their organisations. Most of the advisors expressed concern of their lack of negotiating skills, so Shift brought in a professional negotiator/ manager to train the advisors in the skills of negotiation. This proved to be very successful and certainly helped me understand the structure of successful negotiations. I genuinely believe that we impressed the managers and helped convince many of the managers to engage with our work.*
*TH*

**Managing different sub-groups**
Most advisory groups will involve sub-groups that represent different viewpoints. In order to manage possible conflicts some initiatives choose to keep these sub-groups separate and then bring their viewpoints together towards the end of a process. This enables the sub-group to work separately so that they can construct their arguments and opinions without raising the possibility of conflict and/or needing to compromise their ideas. When differences are very far apart or very emotive this approach can work well. Alternatively you can keep everyone together and work through the differences by open discussion that encourages everyone to hear everyone else out, to try and see things from different perspectives and be prepared, if not to compromise, to agree to disagree but stay committed to the central objective.

There are advantages and disadvantages of both approaches and the options available to those making the decisions will depend greatly on the personalities involved and the local history. The separate route is usually quicker and easier to manage. The ‘together’ route requires more work early on, but, if successful, over time can lead to faster opinion gathering, decision-making in the future and a stronger and more cohesive group. However, if the process is unsuccessful the group can be de-railed at an early stage. At Shift we followed the latter path. Differences of opinion frequently occurred in discussion, especially at the start of the programme, but in general these were either resolved or we were able to set things to one side and add to our learning. As a result we felt that the group became stronger and was able to stand the test of time.

**Managing changing styles**
When staff and advisors are working in partnership they can move between informal and formal and subjective to objective more quickly and more frequently. Discussions can start off being subjective with personal feelings running high but then change when needed to using objective criteria to make a decision. Discussions can begin informally with people’s creative input being inclusively engaged and then focussing on the formal process of decision making by excluding what is impractical.

## Involvement Table

| Stage | Style | Partner | Involvement with content | Time spent being involved | Medium of Communication |
|---|---|---|---|---|---|
| Partnership | Open | Senior Managers | Decision Making | Frequent | Face to Face |
| Consultation | Two-way | Middle Managers | Shaping Ideas and Actions | Time-tabled | Personal contact (e.g. email/phone) |
| Tokenism | Closed | Frontline Staff | Reading | Infrequent | Public meeting |

The above table can be used as a guide to discover at what level people are working. It illustrates, in very simple terms, the differences between a 'tokenistic' response and 'Partnership'. Movement is not always from the bottom to the top; changes, such as new senior managers, might, for example, mean that advisors can fall from having regular meetings with senior staff to infrequent ones with middle managers. In addition elements may be on different rows. For example advisors might be in contact with 'middle managers' but only have infrequent contact about new information without an opportunity to formally comment.

**SHiFT.. Our experience**

Telephone communication has been an essential avenue for many of the Shift advisors, especially at times when they have not been able to travel to meetings. The ratio of staff to expert advisors has meant that there has been times when it has been difficult for staff to always take time out from other tasks and respond. However, this form of communication, and the many hours spent staying in touch, has proved to be very important in establishing and maintaining good working relationships between people who sometimes live hundreds of miles apart.

Email has meant that some people use the telephone less and 'telephone skills' might be lost. It is therefore important to consider the communication skills required on both sides to ensure that people can use their preferred method of communication effectively. There will be periods when communication lines 'go quiet' and either staff or advisors drop out of contact. This can happen when people have to deal with issues outside of the programme, or when the pressure of work makes it difficult to undertake anything other than monitored tasks. It is therefore important to keep a note of contacts so that too much time does not pass, especially at the start of a programme. It is also sensible to share the responsibility of staying in touch so that if one communication line 'goes down' there is another person and/or method that can be used by either party.

# Part Five: Endings

*“I feel that I have learnt to cross a number of great divides between ‘us’ and ‘them’ and learnt to understand even appreciate different points of view. It’s so much easier not to be at war with everybody!*
*RW*

**Knowing the date of the end**
It is important to know when the work will finish so that it can be planned for. Holding the ending in view from the beginning is one way to help manage expectations. However, it is often not until it comes into view that people start to be affected. Therefore it is advisable to construct a timetable with clear actions that people need to ‘sign-off’ to ensure that the work takes place in good time.

**Ending on a high**
It is important to complete the work with positivity and thanks, so that all can see what they have achieved and the difference they have made, so they can take that on into the next stage of their lives. Even if only a few of the goals have been achieved and mistakes have been made it is important for those involved and the wider stakeholders to ensure that people are thanked for their work and that the positives are recognised so that they can be built on in the future. It is also important to clarify the achievements in relation to the original objectives, (and to look at how those objectives may have changed) so that lessons can be passed on to those who will be tasked with continuing the work.

If an event is to take place it is important that both staff and advisors have a say in the content and that there is recognition that, as with any event marking the end of something that has had meaning for people, there is consideration given to providing emotional support where appropriate.

**Evaluation**
It is important for all involved to know and understand what can be measured, how it will be measured, and how to access the information. Quantitative and qualitative information are both important to give an idea of the scale and the emotional impact of the work. Asking the right question(s) is of greater importance than collecting large amounts of data on everything that the group has done. Has the group made things better for the target audience? (did it achieve its mission?)

**What happens now?**
It is important to keep the energy that has built up through a project and allow those that want to to transfer to other projects. It is rare for a project to complete all of its objectives, so there is usually a job of work to continue. Part of the preparation for the end is to look at what opportunities there are to continue aspects of the work. Staff and advisors may not agree with decisions taken and so it might be important to mediate the different views that people have around what comes next and for staff to support advisors to find other channels to communicate their views and/or continue the work.

**Passing on work**
Many programmes will contain elements, such as toolkits, which can have an extended life outside of the completion of the host programme. In order to maximise efficiency, and reduce duplication, arrangements should be made to find partners who can take these on. Partners need to be identified early so that there is time for both parties to see how things will work and support each other. A ‘finger-tip’ parting will not stick, it needs to be more ‘hand to wrist.’

*“Reflecting on what’s been learned and what’s of value has allowed us to move beyond initial programme targets. Collectively and individually we have all developed. For me, I have achieved all that I hoped to and more. Personal ambitions have been realised, skills learned and experience gained. It’s been an unusual journey – and like the best has involved the unexpected. It’s been a challenge and a delight. There is no right or wrong; trusting the process, ourselves and each other has been the secret of its success.*
*AS*

# Appendix one

A list of recent policy documents and initatives that support the meaningful involvement of stakeholders in the management and development of public sector services.

i) **Equalities Bill** (2010) and the **Public Sector Equality Duty** (due April 2011) will require public bodies[1] to produce equality objectives by April 2011.

The EHRC in its FAQ section re: the new bill states, “We advise public bodies to start to prepare for the Public Sector Equality Duty by gathering information and starting to consult and involve their stakeholders with regard to new strands”

ii) **Co-production in Public Services** (Cabinet Office March 2009) In this recent discussion paper co-production is described as a ‘partnership between citizens and public services to achieve a valued outcome.

iii) The Government’s new ‘**Big Society**’ project launched on the 18th May 2010 is focussed on empowering and supporting citizens to work together to shape community services.

iv) **No Health Without Mental Health** (Department of Health, 2011)

v) The move towards independence brought about through the NHS in relation to NHS Foundation Trusts, in education through academies and the planned, albeit smaller examples of health and social care public sector staff being encouraged to set-up their social enterprises to deliver services.

vi) The approach of **Total Place**, an initiative that looks at how a ‘whole area’ approach to public services can lead to better services at less cost. A key theme of Total Place is ‘customer insight’ and ‘customer lead transformation’. The Government’s Total Place report (2010 HM Treasury and Communities) states that the Total Place approach puts “the citizen at the heart of service design”

vii) **Transition Towns (Initiatives)** is a community-lead response to the pressures of climate change, fossil fuel depletion and the increasing financial pressure brought to bear by the economic contraction. Large public sector organisations can set-up their own initiative or may become part of a wider initiative involving a Town (e.g. Totnes and Lewes)

viii) **The Localism Bill** (DCLG, December 2010)

ix) **Our Health, Our Care, Our Say** (white paper 2006) Includes the following statement: “Systematically and rigourously finding out what people want and need from their services is a fundamental duty of both the commissioners and the providers of services. It is particularly important to reach out to those whose needs are greatest but whose voices are often least heard”

x) **World Class Commissioning** (DH 2007) “In order to make commissioning decisions that reflect the needs, priorities and aspirations of the local population, world class commissioners will engage with the public, and actively seek the views of patients, carers and the wider community...Decisions are made with a strong mandate from the local population and other partners.”

xi) **Our Nation’s Civic Health** (DCLG 2010) “There appears to be some untapped demand for greater involvement - through volunteering and participating in local decision making, although converting this appetite into action will be challenging.”

[1] Government Departments, Executive Agencies and Ministers, Local Authorities, Schools, Governing Bodies of Colleges and Universities, Governing Bodies of Schools, NHS Trusts and Boards, Police and Fire Authorities, The Crown Prosecution Service, The Crown Office, Inspection and Audit Bodies, Certain Public Funded Museums.

# Appendix two

A selection of articles from the United Nations Declaration of Human Rights that apply to citizen involvement.

## Article 1

"All human beings are born free and equal in dignity and rights. They are endowed with reason and conscience and should act towards one another in a spirit of brotherhood."

Therefore treat colleagues and clients as equals in a dignified manner. Accept that they will have their own points of view and support them to share their opinions.

## Article 19

"Everyone has the right to freedom of opinion and expression; this right includes freedom to hold opinions without interference and to seek, receive and impart information and ideas through any media and regardless of frontiers."

## Article 21

(1) Everyone has the right to take part in the government of his country, directly or through freely chosen representatives.

(2) Everyone has the right of equal access to public service in his country.

(3) The will of the people shall be the basis of the authority of government; this will shall be expressed in periodic and genuine elections which shall be by universal and equal suffrage and shall be held by secret vote or by equivalent free voting procedures.

## Article 29

(1) Everyone has duties to the community in which alone the free and full development of his personality is possible.

(2) In the exercise of his rights and freedoms, everyone shall be subject only to such limitations as are determined by law solely for the purpose of securing due recognition and respect for the rights and freedoms of others and of meeting the just requirements of morality, public order and the general welfare in a democratic society.

(3) These rights and freedoms may in no case be exercised contrary to the purposes and principles of the United Nations.