



Volume 2:
Planning
Engagement

Engagement Specifications

There are many things to be considered when you're planning an engagement event. For example, you'll have to think about: what you want from the engagement, what the people you're involving want from the engagement, and how to best achieve both.

This can be easier if you use a framework from the start. To make sure this is done consistently, and make a record of the process, you should fill out an **Engagement Specification** to help support your planning.

Doing this also means that you can see previous planning processes, helping you learn from past work.

The Engagement Specification takes the form of 7 steps. Whoever is running a service change or development which requires engagement should take time in the planning process to consider and fill out each step.

Step 1.

Purpose:

Why do I want to engage?

Are the intended outcomes of the engagement clearly understood?

Prompts:

- Improving/changing access to services
- Understanding service experience
- Influencing service change
- Informing plans/strategies/policies

Step 2.

Audience:

Who do I want to engage with?

Is a targeted or A&B wide approach required?

Prompts:

- The general public
- People who use health and social care services
- People who care for others
- Groups with a special interests
- Partner organisations
- Elected representatives
- Health and social care staff

Step 3.

Level:

What does appropriate engagement look like?

Is the level of engagement appropriate and proportionate to achieve the purpose?

Prompts:

Inform Consult Involve Collaborate Empower

Step 4.

Approach:
How do I maximise stakeholder contributions?

Are the method/tools appropriate for the level of engagement?

Prompts:

Inform	Website; newsletter; social media; press article; briefings; Presentations; letters
Consult	Surveys; online questionnaires;
Involve	stories/case studies; Art in Action; World Cafe; Special Interest Focus Groups; Rich Pictures;
Collaborate	VOICES; KETSO; COPC; Option Appraisals
Empower	Representative/member on decision-making/approval groups

Step 5.

Support:
Have I utilised the expertise/support of others?

Is there expertise and support available to prepare and deliver engagement?

Prompts:

- HSCP Engagement Team
- Scottish Health Council
- Reference/advisory group in place
- Critical friend/sense checking advice

Step 6.

Approval:
Do I have the necessary checks & approvals?

Are the governance arrangements clearly articulated and understood by staff initiating engagement?

Prompts:

- Senior level sign-off
- Link to agreed governance group

Step 7.

Prepared:
Am I ready to engage?

Are all the requirements in place described in an engagement plan? (Engagement Plan templates are available)

Prompts:

- Sufficient timescales
- Agreed method
- Resources/funding/support
- Road testing/pilot approach
- Communication plan
- Feedback loop determined
- Approvals

In this leaflet, we'll mostly focus on the purpose, audience, and methods of engagement, since these are the most complicated aspects. In the next leaflet, we will look at how you can make engagement accessible to all.

Finding A Purpose

It may seem obvious, but one of the things most often missed in planning engagement is a solid sense of why you're engaging in the first place.

Having a clear, written aim to your engagement makes it easier to identify the needs of your project, and helps you to manage people's expectations. For example, if you can't adjust what needs to be done no matter what feedback you get, it's important to make that clear from the start. If you're actively collecting feedback or opinions, it's important to know what data you need, how it will be presented and recorded, and what the boundaries are before you go out and discuss it.

A project's aim should be something you can summarise in one or two sentences, for example "Inform unpaid carers on changes to the Carer's Act" or "Investigate people's priorities in developing services". Some projects will have more than one aim.

It can be helpful to consider this alongside the level of engagement (see below), as these two things usually lead into one another.



Your Audience

It's important to consider your audience. It's tempting to aim work as broadly as possible, but this isn't always appropriate or practical.

Different groups of people often have very different perspectives, depending on how they relate to services.

Engaging through an existing group is likely to reach people who have worked with us in the past. This can be helpful, but can also lead to your results being skewed towards a small subset of the population.

If you engage with carers, you may get more comprehensible results, but may also overlook the first-hand experiences of people actually accessing the services.

There is no magical formula to solve these kinds of dilemmas. You have to take each project on its own basis. If you're at a loss, try referring back to the aim of your project and drawing up a map of all the groups or communities who might be affected.

Different audiences may also have different needs, which we will discuss in Guide 3: Access and Equality.

Some Methods You Might Use

Social Media

Sites like Facebook or Twitter can be a great way to spread the word. The Communications Team offers social media training where needed, and the HSCP has accounts on Facebook, Twitter, and Instagram. Also consider posting to local Facebook pages to spread the word more widely.

Traditional Media

There are many local newspapers and newsletters in Argyll & Bute. Get in touch with editors or writers to ask if you can put something about your project in their publication—it's a great way to reach people who may not be online.

Leaflets and Posters

If you want to inform people about a change or event, it can be a good idea to use printed documents. These can be put in waiting rooms and on community bulletin boards, as well as being posted online.

Surveys

If you need specific data, surveys (printed or online through SurveyMonkey) can make engagement quicker and easier for everyone. Data can be easier to interpret and present when you get it in this format.

Letters and Emails

If you're reaching out to a small group of people, particularly those who access a specific service, it may be worth drafting a letter or email to outline your work. These can be sent out en masse to everyone on a contact list, and can ask for responses.

Presentations

A verbal presentation given to a community group or to key invitees can be a good way to lay out information and invite questions. However, it's more for informing people than for getting their views.

Interviews

A one-to-one interview (in person or over the phone) can be a good way to tease out someone's thoughts on a subject. Using the same questions for everyone means you can compare answers to find themes.

Case Studies

Sometimes, all you need is an example. If you're assessing a service or looking at a specific event, it can help to look at individual stories for information. You can also show these to other people to see whether their own experiences match up.

Community Conversation Cafes

An informal, drop-in discussion on a topic. You can encourage people to raise questions, comments, or concerns, and inform them on what you're doing.

Try giving people post-its or paper tablecloths on which they can record their responses.

Our Voice

Our Voice is a network of engagement opportunities set up by the Scottish Health Council alongside other organisations.

You can find out more by emailing Alison McCrossan at alison.mccrossan@scottishhealthcouncil.org

Focus Groups

The best way to get conversations going can be in small, dedicated groups. Invite people from your audience to come together to discuss concerns and ideas. Often, new thoughts and ideas come from how experiences intermix.

Options Appraisal

Once you have a few potential ideas or solutions laid out, you can invite people to get involved in options appraisal. People analyse the strengths, weaknesses, opportunities, and threats of each option presented, and ultimately score them based on which they think would be the best idea.



Engagement Guides

1: What Is Engagement?

2: Planning Engagement

3: Access and Equality

4: Reviewing Engagement

If you need large print or another format, let us know:
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