Engagement Toolkit

A RESOURCE FOR AGED CARE STAFF

Acknowledgments

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What is engagement?

Consumer engagement is about how we communicate and interact with people, and how we involve them in decisions and planning. This can be individual, or it can relate to a whole service or even the whole organisation.

Engagement could involve direct discussion, collaboration, or partnership with one or many people at any given time. However, it may not necessarily involve direct personal contact. It could involve information sharing through marketing materials or information sheets, or the development of web services that people interact with, or communications about accounts or billing.

If you see, talk to, or interact with the people using your organisation's services, their friends or family, their support people or the broader community, or if your role involves providing a service or system that people use or interact with, then what you're doing is about engagement.

In other words, engagement is the responsibility of all staff.

Why do we engage?

People who use or interact with care services have an important role in the planning, delivery, and evaluation of those services, as well as in the direction and evaluation of their own care. Effectively engaging with people is fundamental to fulfilling the organisation's mission and values. Good engagement practice values the contribution individuals can make at every level of the organisation.

There are many important benefits to engaging effectively. These include making sure services are appropriate, inclusive, and innovative, increasing satisfaction with and uptake of services, and increasing support for people's control and autonomy in their own lives.

Involving people in decisions that affect them is required under the Quality Standards and care legislation. An important part of the role of care services is supporting each person to have a strong voice and to be heard.

Engagement is an investment in relationships, and this is important right from the very first contact with people to help things go smoothly along the way.

Commitment to engagement

There are many different forms engagement can take. It is important that organisations support innovation and the development of new ideas about the way they engage. All staff are encouraged to be proactive in seeking new ways to connect with people.

All staff need to be supported to undertake engagement and participation initiatives, and the people they are trying to engage with also need to be supported to participate effectively in these initiatives. Staff should be encouraged to help identify areas for improvement and to come up with ways to address any issues they see in the organisation.

It is important to provide feedback on what you have learned and how you have responded. This feedback needs to be shared with all the people involved and anyone affected, and fed back up through the organisation. Staff need to be supported to learn from and provide feedback to stakeholders as part of the engagement process.

Care organisations have many different stakeholders. As well as the people using their services, their friends, families, and support people, stakeholders may include information services, other service providers, policy makers, consumer groups, or representatives, as well as the broader community.

All of these stakeholders are diverse. Different people or groups may need a different approach and engagement processes must be designed in a way that is inclusive of marginalised or isolated groups and that recognizes the particular needs some individuals may have. No-one is impossible to engage with, if the right approach is used to support them.

Engagement initiatives should be documented and evaluated to inform reporting for accreditation and monitoring. This should inform decision making as well as future engagement initiatives.

Create the right spaces

People should have a say in their own care as well as how services are run. That is, they should be able to have a say in things that affect their service and their community, as well as just themselves. It is important to ensure there are enough participation opportunities for people, and that these are appropriate. This means matching the type of engagement to what you are trying to achieve as well as to how people want to be engaged.

Be open to influence

Everyone affected by decisions or services has a stake in the decisions that are made and the impact they have. You should promote shared ownership of decisions, monitoring, and evaluation of services. As part of this, monitoring and evaluation of services and care should be an ongoing, continuous process that encourages dialogue. You need to show that you are open to change and to the influence of different stakeholders. It is important to demonstrate that you are open to hearing criticism and ideas, and will consider them no matter who they came from.

Model respect and inclusion

Mutual respect and ensuring the dignity of everyone involved is essential. This means ensuring all participants show respect for each other through the process and you clearly demonstrate that you value each individual. This also means respecting the diversity of people and their views, needs, and wishes. All opportunities to participate need to be made accessible in practical ways that cater for varied abilities. People might also need some training or education to help them participate effectively. This is your responsibility.

Share openly

Communication needs to be open and transparent to ensure everyone is properly informed and can voice their own opinions, ideas, or needs. This also applies after people have participated – they need to know how their ideas did or did not contribute to changes or decision making. You also need to evaluate how any engagement activities went and the impact they had, and make sure that everyone has a chance to learn from the experience.

About the Toolkit

This set of tools is designed to guide you through the process of thinking about what engagement looks like for you and your colleagues, what is working well, and what needs to be improved. The tools will help you to plan a project to make these improvements, and then implement and evaluate your project.

Your project could be designed to help other staff engage with people better, or you might want to engage with people directly yourself about an issue you know about.

Designing and implementing projects like this can be daunting, especially if you haven't tried it before. These tools are designed to walk you through the process, and to make it simpler.

Using these tools will help you to plan and implement actions to address issues in your service, but will also help you to document what you are doing to address these problems. This is important for the organisation to be able to track what is happening throughout across the different services, and to show how different stakeholders, including people using the services, are involved in service improvement.

Some examples

Wall snippets

A group of staff in residential care identified that their colleagues did not always take their time with people and communicate clearly. They were concerned that staff did not always prioritise individuals because they were rushing, and sometimes forgot that people may have particular issues such as hearing impairments or dementia, which might affect their communication.

They designed a series of short informative "snippets" in the form of a sentence or poem. These addressed aspects of communication including respect, volume, tone of voice, special communications needs, and body language. Some gave information about hearing impairments and cognitive impairments to help remind staff about what they had learned in training. These snippets were placed on the staff room and nurses' station walls and regularly rotated every couple of weeks.

Guide to Care

A group of staff in residential care recognised a need among family members and other support people for support and ongoing information, to help them feel engaged in the life of the service and in the care of their loved one. One of the major issues they identified was that families were overwhelmed with information and emotion during the official admission process, and they often were not able to properly deal with all this information. This created issues later on.

The group decided that the existing Resident Handbook was not appropriate for family members, and that a short dedicated resource for families was needed. They designed a "Guide to Care" for family members and friends to keep, which provided the information they would need throughout their family member or friend's time in the service.

Dementia friendly cafe

Staff in community care wanted to provide a safe and comfortable space for people with dementia and their caregivers to socialise and to receive and share information.

The service held a café day, to which they also invited staff from other dementia services. They served food and drinks and provided space for people to give and receive support and information.

How to use the tools

You can use these tools on your own or in a group. It is helpful to gather a team of people around you who share the same concerns and want to address the issues with you.

You can use the tools together in order, or you can take just one on its own to help you with your thinking about a project. You can fill in each tool at your own pace, save your copy of the Toolkit, and come back when you are ready.

You should discuss your project idea with your manager before completing a full plan for your project. You should also work with your manager along the way to make sure that what you are planning is possible. Your manager can support and guide you in using the tools to design, implement, and evaluate your project.

There are hints and tips throughout the Toolkit to help you think through your project. In the electronic version of the tools, you can find these by hovering your mouse wherever you see this symbol ⓘ.

The **Engagement Mapping Tool** is designed to help you identify what is already happening in your service or organisation.

The **Need for Action Tool** is designed to help you to think about how you and other staff engage with your clients, and any issues you can see that need to be addressed.

Problem identification

Once you have your project underway, you can use the **Monitoring and Evaluation Tool** to help you think through how it is going, what you have achieved, and whether you need to change something.

You should use it multiple times throughout your project to help you reflect and evaluate and make changes along the way.

Feedback & Follow up

Project design
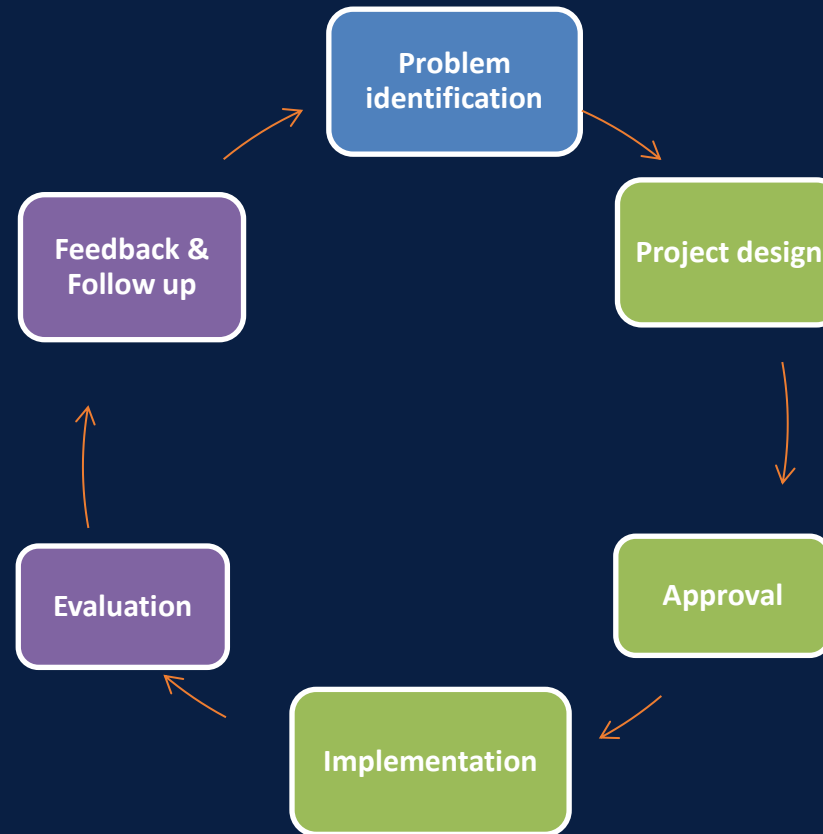
When you have identified something that you think needs to change, you can use the **Action Planner** to help you work out how to achieve it.

Evaluation

Approval

Before you implement your plan, you will need approval from your organisation.

Implementation

Once you have approval, you can start to implement your project according to your action plan.