Culture Change for Engagement

Introduction

Excellent engagement and co-production require a value base and culture which is inclusive, egalitarian, and power sharing. Joint decision-making is the way things are done as a matter of course. Commitment to this way of working stretches from the front line to top management and everything in between. The process is continuous, from setting priorities to the development of a concept, and through to its delivery review, evaluation and monitoring.

The value base applies equally to front line clinical decisions and every level of decision-making beyond that. The desire for service user and carer input is genuine and the difference this makes is demonstrable. This culture is not compatible with any form of coercive practice.

A systematic analysis (Parnelli, E et al 2011)[1] looked at the evidence base for culture change in healthcare settings found that there was not a sufficient evidence base to identify any 'effective, generalisable strategies to change organisational culture'. However, cultures do change and we can learn from successful strategies tried elsewhere. The following strategies have all been used in health care settings in implementing change processes.

Setting out your values and principles

It is important to be clear about the culture you are trying to achieve. Given that you are looking for a co-productive culture it seems appropriate to generate the vision of what you are working towards as a co-productive process. This is a process which tends to create buy in to the product created, which is a great way to start. This is why we recommend that you work on developing co-production principles in a co-productive way.

Once you have chosen your principles it is important to communicate them and use them in day-to-day practice in decision-making meetings. This could include re-visiting them at the beginning of meetings, writing them into Terms of reference (ToR), and tracking the application of the principles in the development of meeting papers and the work they describe.

However, people won't just sign up to these principles on the basis of a description alone. In fact, many may already feel that they are meeting these values even though their behaviour remains inconsistent with them.

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[1] Parmelli E, et al, The effectiveness of strategies to change organisational culture to improve healthcare performance: a systematic review (2011) Implementation Science 6:33 1748-5908-6-33.pdf

Getting high level sign up

Commitment from the highest level in the organisation is critical for leadership in the process, conspicuous role modelling of the behaviours required and support for the changes needed, as well as allocating the resources required for the practical tasks which will facilitate change.

Embed values and principles in all strategies, policies and procedures

The content of strategies policies and procedures very much sets the tone in an organisation. They guide behaviours, performance management, organisational development, training and development programmes and the direction of organisational improvement.

This is an area where high level commitment is essential.

Recruit on the basis of co-production values and skills

The more people you have in your organisation who are eager and enthusiastic about working in a co-productive way, the greater the impetus for change will be. Some authorities on culture change talk about the need for a movement rather than just a management process. This takes passion for change and belief in the direction of travel. It is easier to recruit people with the right values than it is to change the values of people who are resistant to the co-productive process.

Emphasise, reinforce and celebrate what's already been achieved

With co-production we are not starting from ground zero. A lot of progress has already been made. There are pockets of good practice which ably demonstrate the benefits of working in this way. By publicising and celebrating this, it is possible to make those benefits more visible. When people see success, they will want to emulate it.

Good practice examples within your organisation are potent drivers of change as has been the case with the Recovery and Well-being College in Cardiff, which is now being replicated across Wales in stages. It has regular public forums where members of the college staff talk about the benefits of the co-productive process, as well as the benefits to students of the recovery training approach. It has helped to fuel the momentum for investment in co-productive working in Cardiff.

Embed Team Engagement Delivery Plan (TED) plan in teams

A TED plan is a Team Engagement Delivery Plan. It is based on the principles of the Team Recovery Implementation Plan promoted by ImROC (Implementing Recovery

for Organisational Change). It requires a 4-stage cycle preferably done with service user and carer engagement.

- Team self-assessment

- Choose goals for year.

- Plan and deliver actions.

- Reassess at end of year and create new plan.

The first stage of designing this would be creating list of statements to describe how well the team is demonstrating a co-productive and engaging culture. (Similar to those in the self-assessment resources available on the Forum website to be used alongside the Guidance.)

The self-assessment is subjective and not for benchmarking with the performance of other teams. More for the team to measure themselves against at the end of the year.

A co-productive process for the team would then choose a realistic number of goals for achievement in a year. There will need to be a way of demonstrating success such as numbers engaged, decisions impacted etc. These goals need to be translated into actions, and milestones that the team can work towards.

After the year the team do another self-assessment exercise to evaluate their progress and to decide on the next year's goals.

Have a champions programme

Champions for change are enthusiastic and well informed about the change you are looking for. They tend to be people who are respected within a team, and who can lead opinion, even if not in an official leadership position themselves. Statutory sector engagement leads would be organisational champions for change, whose purpose will be around implementing the guidance, supporting culture change and leading on specific engagement projects and exercises.

However, a champions programme also needs team members who can demonstrate how to make co-production work in day-to-day tasks and activities. As it would be additional to their usual day job there would need to be additional incentives, such as additional training about co-production, learning set membership with other champions, and additional support e.g. through an engagement lead in the organisation.

The position requires role modelling co-productive working and effective service user and carer engagement. It involves advocating for co-production in team meetings, in day-to-day work-place conversations and in informal work-place settings, such as in staffrooms, facilities for making tea and coffee, and staff cafes. It also involves highlighting and signposting staff training opportunities and encouraging people to sign up for them.

Engage people who are already enthusiastic in the change process

Engagement processes require the input of staff and leaders. If you start by involving those staff and leaders most committed to the process, you will be able to evidence and support those who are most resistant to change. Any engagement activity or event is an opportunity to demonstrate the benefits of the process, not least being the satisfaction gained from working together to improve services, releasing people's creativity and their curiosity about each other. Engagement activities can and should be enjoyable activities.

However, the activities do have to be taken through to the point of impact, so they don't just lead to a report which goes nowhere.

Promote the benefits of co-production and engagement and experiences of staff, service users and carers

Any good sales executives will tell you that to sell something you have to sell the benefits. This includes the benefits for service users and carers. They benefit from developing skills and improving confidence. They can connect with a community of like-minded people through group activities and can gain satisfaction and a sense of purpose through using their talents and skills. The work can increase employability if the individual wishes to seek it and provides opportunity. This all ties in very nicely with the idea of 'recovery.'

Many of these benefits also apply to staff. However, staff have also reported feeling more connected with the original reasons why they wanted to work in mental health and feeling more motivated in their work and more satisfied. Being in a position to influence service improvement is exciting, especially if you are in a position to implement change in your own practice.

Having a newly created vision for service improvement is also motivating for leaders as it gives them an opportunity to make a real difference through their role.

Track measure and publicise the impact of engagement

However, for everybody a huge benefit and motivator is seeing this work deliver an impact. For this reason, it is essential to keep up the momentum and to report back what has changed as a result of the process. Reports of what has been discussed and agreed are a start in this essential communication process as this shows people that they have been heard. It is helpful to include in any such report the next steps for taking ideas forward. Reports are likely to go to committees and other decision-making groups, where their impact on decisions needs to be tracked. Any delivery plans which take the idea forward need to be communicated back to participants. Any review or evaluation of changes also needs to be reported back and publicised.

Use examples of experiences to illustrate the impact of engagement

The ultimate evidence of achievement is how the change effects the staff, service users and carers at the front end of services. This is how the work will finally be judged. Lack of change here is the biggest demotivator, in order to demonstrate this, change you need service user, carer and staff accounts of how their experiences of services have improved.

People love to hear positive narratives, and to see people flourish and grow in their lives. Reported experiences are probably the most powerful tool for motivating further development and change.

Work with existing staff groups – e.g. communities of practice, strategy leads, unions, colleges, network board

No organisation will be alone with this culture change project as it will be being delivered across all of Wales. Therefore, it needs to reach into every group where staff meet formally or informally. A community of practice for engagement workers will be set up, but there needs to be engagement with this work in all the Welsh communities of practice in mental health. Some of the national staff groups have not traditionally included service users and carers, even though they have huge potential to spearhead the co-production culture change that is needed.

Organisations which promote professional culture such as regulatory bodies and Royal Colleges have a critical role to play. Even though many have some engagement, and even some co-production most still have a way to go. There was a time when organisations invested in engagement workers then these roles became withdrawn due to austerity cuts. It is important to stress that co-production is not a luxury to be cut during tough times but a resource to guide how sparse funds need to be placed to make the biggest difference.

Given that culture change is the most often raised vehicle for service improvement, often costing very little for the huge difference it makes to the quality of people's lives, it deserves the resources needed to make it happen.

Training programme in values, principles, skills, behaviours, benefits, techniques

A training programme is essential to spread co-productive working throughout the organisation so that it becomes 'the way we do things around here.' Without clarity of what you mean by a co-productive culture staff will believe that they're already doing it by making decisions they think are in the 'best interests' of the service user/ carer. Because their motivation is to be focused on the service user, they may be seeing that as putting the service user at the heart of their work. Service users and carers don't need to have decisions made for them, even if benevolently motivated, as that will make them dependent and strip them of the decision-making skills they need to take more control over their own lives. This is a fundamental step in recovery. They do need their views to have as much weight as possible in decision-making.

The training programme needs to encompass the advantages of co-production by; clarifying what's expected in the new culture; and equiping staff with the skills, behaviours and techniques needed to realise the co-productive culture. The training and development evidence base supports the use of short bouts of training with time for reflection and trying out new ideas and skills between them.

It is also helpful to have a co-productive process as a part of the training process itself. For staff already putting engagement and co-productive processes into practice, a learning set model is a useful process for support with creative ideas for solving practical problems in engagement, as people discuss what they are actually doing and how to improve it.

It is useful to harness this kind of discovery on the job to identify the skills needed to deal with the frictions that inevitably arise, both as a result of culture change, and as a result of the co-productive process itself.

Link to supervision and line management (e.g. PADR)

Clarity about the actions required from staff and behavioural expectations can be further reinforced through referencing them in the supervisory and line management processes. This will give staff an opportunity to reflect on how co-productive they are and how well they engage people in service development. Issues like taking

constructive criticism and coping with distressed accounts of service user or carer experiences of services create support needs for staff.

Staff will also need positive recognition of what they are achieving, and of any significant steps they are taking towards changing the way they do things. It will be useful to have behaviour statements against which staff can assess themselves, which could be the same statements as used in the TED plan.

Self-assessment can help to identify the staff member's learning needs and feed into their review and performance appraisal process.

Report back on progress regularly

As examples of success can be motivating, so are public progress reports. The process can be trusted if the organisation does what it has set out to do. This is another way of letting people know how their input has been used and also creates public accountability. Knowing that there will be a public report is an additional driver to ensure actions are delivered.

Pay particular attention to where friction or conflict occurs as this is where change is most likely to be needed

The co-productive process is often focused on change and improvement of services. As such it can carry a high risk of conflict between different parties. Service users and carers don't always agree with each other let alone with other partners. Validating all views even when they are opposing is important together with, as far as practicable, coming up with creative/flexible solutions that give room for all views to be accommodated. A culture change which encompasses the need to deal with conflict and disagreement in a constructive way will be challenging for everyone.

Additionally, any culture change process tends to raise friction in itself. In its progress members of the Forum have in effect been travelling the early path of this culture change, hence the issues raised in the guidance have largely arisen as a result of learning from frictions and conflicts about the process. This is where it is particularly important to pay attention when people get emotional or when they raise complaints or concerns.

Up to this point there hasn't been a concerns process for dealing with issues associated with engagement or co-production, so there has been no formal way to deal with and learn from the concerns people have had. The Forum has found discussing these process issues has led to some very constructive ideas about how to make engagement and co-production more effective.

Focus on the actions that demonstrate the change

Culture is notoriously difficult to define, and hence difficult to communicate and embed. However, it is possible to be clear about the kinds of actions you want to see.

Use staff engagement to lead the change

It isn't realistic to expect staff to understand co-production at first if they have never been a part of a co-productive process themselves. The very hierarchical nature of many statutory services with clear divisions of labour into well demarcated roles doesn't lend itself well to greater staff engagement. This is due to the difficulty in making time for it in already busy workloads. However with this culture change, it is critical that staff do have that experience, even if on the small scale of being part of a TED plan process.

Go for the quick wins – small changes with big impacts

If you can find a quick win it helps to buy support at a relatively low cost. As far as meetings are concerned changes to Terms of Reference are a good and easy place to start. They can be co-produced by the members of the group, on a template if that is required, and can include the terms of office and numbers of service user and carer representatives and can also clarify the role of service users and carers in the group. This gives the group the opportunity to explore and discuss this and clarify what they want. The consultation would suggest this is representative service user and carer voices which are informed by and responsible to other service users and carers in the community.

The independence of voice of service users/carers is to be promoted within these groups throughout the entire process

Another relatively quick win in meetings which creates actions much more widely is the requirement to include information on how service users and carers have been engaged in the work described in each of the papers coming to committee. To start with, most papers will not have had engagement but with time, progress will be more visible because it has to be noted. People writing papers will be much more aware of the need to engage and provided the resources have been dedicated to enable engagement, including time, they will be able to deliver this as the pool of people willing to get involved increases.

Conclusion

Whilst culture is a hard concept to define and changing it is a long-term project; there are steps that can be taken to support the process. The recommendations for action in the guidance are designed to support this culture change.

Further examples of best practice will be published and celebrated on the Forum website as they emerge.