

# Provision of Support for Representatives and for General Engagement Processes by Third Sector Organisations

## Introduction

Engagement workers or those in similar roles, need to be visible and available as a point of contact for anyone who wants to get involved.

Third sector involvement/ engagement workers play a vital role in making service user and carer engagement opportunities prominent and in turn recruiting and supporting people to fill these opportunities.

It is important to highlight the potential and essential role of supporting and coordinating local engagement with a wider group of service users and carers who can then inform the work of representatives. Administrative support for these meetings of service users and carers in a locality is essential.

Appropriate Support also needs to be available for those occasions when engagement triggers mental distress.

Representatives need to feel supported and listened to. This will require access to a worker to provide and facilitate this support. This may be delegated to an external third sector organisation, dependant on the support required.

Resources need to be available in order to provide information, training and support for those people representing the service user and carer voice.

There are many excellent examples in the UK and overseas of 3rd sector engagement workers working collaboratively with statutory sector engagement workers.

## Challenges

It is important to recognise the challenges of this role.

Due to data protection legislation it can be difficult to have access to information about service users and carers, especially those who are less often heard. This situation can be improved by third sector staff having direct links with statutory sector engagement workers who have access to more people.

Due to the limited time and capacity that service users and carers have it can sometimes be difficult to recruit the number of people to meet the demand for engagement work.

Arranging meetings at times that suit service users and carers can be difficult, especially for those at school or in work. This is often easier when working with smaller groups, where mutually suitable times can be agreed more readily. It is also essential that each meeting is quorate, with quorum arrangements agreed in advance with the group's membership.

At times legislation and organisational processes can limit how much service users and carers are able to influence commissioning and contracting decisions. By having open and honest communication this helps people understand these boundaries and what can realistically be changed.

Specific skills, knowledge and attitudes are required of those who represent service users and carers in particularly complex areas of work such as commissioning.

It can be difficult to challenge the power of the larger statutory sector organisations from within a third sector base. This includes getting buy in from statutory services to the engagement process and also delivering on the culture change needed within statutory services to make engagement and co-production a reality. Having an engagement worker within the statutory services as an ally and partner to support and work with service users and carers work directly helps to address these difficulties.

Distance, travel time and poor digital connectivity can make it difficult for people to come together, particularly in rural and remote areas with issues with digital technology. In these areas it can also be difficult to justify a full-time engagement worker, meaning engagement activity may need to be undertaken alongside other roles and responsibilities.

People who would have previously struggled to attend face to face meetings due to various commitments, now have the benefit of attending online meetings to keep in contact with others.

Financial constraints may restrict the range of engagement activity that can be undertaken, including payment for representatives and participants. Short term funding can make effective engagement difficult, and where engagement funding is not ring-fenced, it can be at risk of being reallocated to other activities.

Communication with commissioners could be improved by having a nominated contact person, should these exist as part of any contract arrangements.

In organisations where contract monitoring meetings take place with commissioners there could be opportunities for service users and carers who use services to be able to share their views and experiences.

There are also opportunities for closed meetings to take place between commissioners, service users and carers where they can speak freely about the support they are receiving from their organisation.

### **Choosing third sector support**

Service users and carers have indicated a desire to play a greater role in the selection, monitoring and evaluation of third sector providers, as well as in decisions relating to associated budgets.

Commissioning and procurement processes must be fair and transparent, and where service users and carers are involved as part of the procurement team, appropriate safeguards must be in place. This includes recognising the intensity of the role, managing conflicts of interest, and ensuring participants are aware of relevant legal and procedural limitations.

### **Role requirements for supporting service user and carer representatives**

Third sector support for service user and carer engagement varies widely. Experience and consultation feedback has shown that some organisations are already carrying out most, if not all, of the roles listed in the document.

It is important that these activities are seen not just a checklist but as examples of good practice and as being integral to achieving high-quality engagement and co-production.

Whilst these documents are being published as a guidance document we encourage commissioners to consider the content of the guidance and recommendations when designing service specifications and in monitoring and review of services.

### **General Duties for Engagement / Involvement officers**

- To be a point of contact for people interested in participating in discussions about mental health services.
- To develop a contact list of people who are interested in taking part in engagement activities.
- To actively seek to engage people who are less often heard. (One area has a part time BAME engagement worker).
- To run local group(s) which facilitate a less formal environment in which service users and carers can share their views about services and what needs to be done. These groups would help people build confidence in sharing their views,

talk to representatives, and hear how their views have made a difference

- To make engagement accessible to all through ensuring a range of ways to engage.
- To simplify the process for decision-making where appropriate and possible so that more people can be involved.
- To keep up with best practice in supporting engagement and service user and carer representatives through various forums and organisations such as co production network for Wales.

### **Support prior to and during meetings**

Best practice would deliver the following support to representatives from engagement workers.

### **Resources**

Ensuring representatives have access to the following resources:-

- Printing equipment/costs
- IT equipment to access emails and meetings
- Internet access costs
- Software
- Stationery costs
- Telephone costs where required
- Funding to pay for training to meet needs identified
- Funding to attend relevant conferences
- Travel and subsistence costs

Hot-desking is a possible solution in providing access to these essential resources. Representatives need to be able to hear people's views without compromising their own privacy.

It has been suggested that these costs be a ring-fenced budget heading within engagement SLAs.

## Arranging Meetings (including Health Boards)

- Consider availability of representatives for smaller/local groups e.g. under 10 people
- Ensure sufficient notice of meetings (at least 2 weeks) through a variety of methods.
- Ideally meetings will be scheduled for the coming 12 months.
- Consider the timing of meetings to allow for pre-meeting and to avoid traffic (where possible).
- Ensure papers are received in good time (at least one week in advance) in the requested format
- Papers are sent direct to representatives and not via third sector organisations
- Where a support organisation also organises service user and carer groups, ensure that those groups have an opportunity to discuss papers prior to the main meeting.
- Wherever possible it helps to have a named contact person arranging each meeting so that there are clear lines of communication
- Ensure communications and papers are provided through software which is readable by the representatives. This may be done through access to an office-based computer (e.g. hot desking)

## Preparation for all meetings

This can be done through a pre-meeting with the engagement worker:

- Ensure understanding of papers
- Discuss issues raised
- Representatives practice putting views across
- Representatives prepare for challenges to their views
- Provide necessary technical equipment and support/training (when required)
- Engagement workers to ensure representatives have everything they need for meetings including reminders of time and date

## Personal support

- Wellbeing checks
- Help with self-management when needed
- Skills and ability check e.g. consider issues such as training needs e.g. self-organisation; travel support; and remuneration
- Arrangements are made to pay expenses at meetings
- Dealing with personality clashes
- Building relationships with partner representatives
- Dealing with power imbalance
- Dealing with complaints between representatives
- Raising concerns
- Team building and development of ground rules
- More experienced representatives are needed to support new representatives. This requires terms of office long enough to cover if there is low availability of new representatives.

## Expectations during meetings

- Where possible meet and greet representatives prior to meeting
- Ensure Individual additional needs are accommodated
- Refreshments should, where possible be provided e.g. at least tea, coffee and water
- Support service users and carers to present the views of absent representatives
- Ensure equal value is given to representative voice
- Treat everyone with dignity and respect

## Post meeting support

### Provision of support for representatives after meetings

- Support representatives to report back on meeting outcomes
- Support representatives in any actions they are involved in

- Timely distribution of meeting minutes
- Debrief and wellbeing check ideally through a group meeting
- One to one support if needed

### **Communication between meetings**

- Support organisation should not act as an intermediary between representatives and other committee members and stakeholders
- Representatives have a right to speak to organisations and committee members and stakeholders directly
- Support organisations to provide support but do should not influence or deliver (unless requested by the representative) the messages from representatives
- Where requested provide support to representatives to communicate with committee members and stakeholders
- Any meetings about representation or service user or carer experience must include representatives
- Representatives should be able to have meetings without third sector support if they choose to.

### **Other considerations**

- Budget allocations for mental health involvement within organisations should be open and transparent, with decisions about how funding is used made jointly with local service users and carers.
- There should be a robust policy for dealing with Bullying and Harassment including, processes for investigation and action within the supporting organisation. This will also apply to service users and carers who are taking part in any engagement activities.
- Organisations will should have a clear and accessible policy to deal with Grievances and Complaints, along with an independent appeals process.
- Policies and processes will be identified from the outset regarding what will happen if things go wrong. If NHS staff were bullying a representative, the health boards 'Putting Things Right' process would be used.
- Support organisations should support representatives to engage with other local service users and carers in the community

- Service user and carer representatives are encouraged to take the initiative to arrange their own work, for example by way of action plans.
- Support organisations should support representatives to undertake opinion research on mental health services in the area e.g. development and analysis of surveys
- Organisations to support individuals to participate in recruitment processes
- Organisations to ensure full and direct representation by service users and carers in any meeting about engagement
- Service users and carers should be involved in choosing which representatives attend which meetings through expressions of interest
- There should be back up representatives if a representative is not be able to attend a meeting
- Service users and carers are acknowledged for work undertaken
- Service users and carers are invited to participate in any evaluation of their own work
- Service users and carers should be involved in the awarding, determination of performance targets as well as the annual evaluation of SLAs for third sector support organisations and individual performance of the third sector staff who work directly with them.
- Service users and carers should be involved in the selection of staff who will be supporting representatives, including when this is an internal reallocation of roles or a promotion from voluntary work. This is required to ensure the process is open, fair and transparent and to ensure the appointment meets the needs of the representatives.

## Summary

Service users and carers want a much more co-productive role in the determination of the role of third sector support for service user and carer engagement and in the selection of the staff who support them.

They want the same level of resources as other partner organisations and staff, the right support to do their role, and the freedom to speak independently. Their views should come directly from service users and carers, without influence from others or

being filtered through another organisation. They also want fair conditions of work, which reward their commitment and experience and provide opportunities for future development such as helping to train and mentor new recruits.