 <p> GIG CYMRU NHS WALES </p> <p> Iechyd Cyhoeddus Cymru Public Health Wales </p>	<p style="text-align: right;"> Name of Meeting Quality, Safety and Improvement Committee Date of Meeting 16 September 2024 Agenda Item 4.6 </p>
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Our Approach to Engagement	
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Approval/Scrutiny route:	Business Executive Team 4 September 2024 Quality, Safety and Improvement Committee 16 September 2024
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<p>Purpose</p> <p>The purpose of this paper is to provide the Business Executive Team with an overview of the current engagement offer and challenges, and to offer a recommended approach to establish a central engagement function within PHW.</p>
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Recommendation:				
APPROVE <input checked="" type="checkbox"/>	CONSIDER <input checked="" type="checkbox"/>	RECOMMEND <input type="checkbox"/>	ADOPT <input type="checkbox"/>	ASSURANCE <input type="checkbox"/>

Link to Public Health Wales [Strategic Plan](#)

Public Health Wales has an agreed strategic plan, which has identified seven strategic priorities and well-being objectives.

This report contributes to the following:

Strategic Priority/Well-being Objective	All Strategic Priorities/Well-being Objectives
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Summary impact analysis

Equality and Health Impact Assessment	An Equality and Health Impact Assessment is not necessary, as no decision is required.
Risk and Assurance	N/A
Health and Social Care (Quality and Engagement) (Wales) Act	This report sets out a recommended delivery plan for co-development of an organisational approach to engagement. It therefore directly supports the implementation of the Health and Social Care (Quality and Engagement) (Wales) Act, in relation to the Duty of Quality and Candour.
Financial implications	To be determined based on agreed approach.
People implications	To be determined based on agreed approach.

1. Purpose / situation

The purpose of this paper is to provide:

- A summary of the work undertaken to date including feedback obtained from PHW directorates relating to engagement activity.
- To reiterate the case for change with a move towards a coordinated approach to engagement activities across the organisation.
- To recommend a phased delivery approach to achieving this.

2. Background

'Our Approach to Engagement' was launched in 2021 and came to the end of its implementation plan in March 2024.

Whilst the approach was developed to provide an organisational framework for engagement activity, it has not been delivered as originally intended throughout the organisation.

There is recognition that the current approach needs to change, and ongoing discussions have taken place on how to achieve this organisationally over the last year. The conclusion being there is a clear case for change, and this is supported by both the Business Executive Team and Quality, Safety and Improvement Committee if the organisation is to fulfil this shared ambition for our engagement work.

Between May and July 2024, exploratory conversations with senior staff across all directorates have taken place with the aim of understanding what is needed and to socialise the work that needs to happen to take the engagement function forward. Exploratory discussions also included seeking views on how best to work with PHW teams to identify the organisational needs and how best to work together to achieve a shared outcome.

3. Justification for Change to the Existing Approach

Engagement is a key driver in meeting our duties as set out in the Equality Act 2010, Socio Economic Duty, The Health and Social Care (Quality and Engagement) (Wales) Act 2020 and The Well-being of Future Generations (Wales) Act 2015.

In 2021 an Audit Wales report identified areas where PHW was not getting its engagement activity right and the report highlighted the following areas for improvement.

- PHW does not routinely and consistently collect information about the protected characteristics of its users or of people taking part in its research unlike much of NHS Wales.
- Learning from engagement is not shared consistently across the organisation to support improvement, in part due to lack of processes and infrastructure to support this, exacerbated by the lack of a 'Customer Relationship Management' system to ensure a coordinated approach to engagement activity.
- The inability to evaluate the quality and effectiveness of engagement activity within PHW.

Additionally, it is acknowledged that the current approach to engagement is not fit for purpose and is reflected within the PHW strategic risk register as follows:

Risk of: The organisation failing to effectively engage with the public in relation to their health and wellbeing.

Due to: Failure to build relationships with stakeholders, communities and our service users; not having or utilising tools and resources to support engagement; a lack of workforce commitment, skills and capacity; and failure to monitor and evaluate the impact of engagement.

4. Analysis of the Issues: The Current State

The specific issues that inhibit a coordinated and sustainable approach to engagement activity in PHW, are as follows:

- No agreed definition of what engagement is:
 - Whilst definitions exist for every aspect of engagement in the 'Our Approach to Engagement' framework, they are not currently recognised, owned and agreed organisationally. Therefore the meaning and interpretation of terms such as 'engagement' and 'person-centred' and 'co-production' differ widely across the organisation, leading to lack of consistency.
- An inability to evaluate engagement activity:
 - It is not possible to evaluate engagement activity through shared key performance indicators, auditing or reporting of engagement and consultative activity.
 - It is not currently possible to measure the quality of engagement or benchmark progress/impact.
 - It is not currently possible to identify who has been engaged with (Equality) (including any under-represented groups).

- Lack of infrastructure:
 - A central enabling resource was established to lead this work corporately but delivering on this agenda has been challenging.
 - The infrastructure required to achieve success, namely an organisational offer of support for engagement activity for all teams, is not in place currently. At present, some teams benefit from having established engagement functions within their directorates, whereas others do not, resulting in a lack of a consistent offer for advice and support on engagement activities for their areas of business.
 - Currently, the central engagement resource sits in a separate Directorate to other engagement teams / roles without a formal connection to these other areas of work, such as the 'Time To Talk Public Health Panel'.
 - Engagement functions across the organisation are not currently connected to each other and lack a common 'engagement identity' as a collective. Engagement activity also takes place outside of formal existing engagement structures, further compounding the lack of organisational oversight of engagement activity.
 - Divisions/ Teams continue to develop positions and recruit to engagement posts exacerbating the issue further through the lack of consistency of job roles and titles along with variable person specifications core competencies. This, in turn, perpetuates the silo working and a lack of cohesion.

- Duplication and financial implications:
 - Teams without an engagement function who require engagement support but cannot secure internal resource are regularly commissioning engagement support from external organisations.
 - Teams with engagement functions are also commissioning engagement and insight activity from external providers.
 - There is currently no agreed organisational position or approach on the reimbursement of expenses or reward offered for people (service users) involved in our work, leading to an inconsistent approach to reimbursement management.
 - There is not at present a coordinated and consistent organisational attendance at public engagement events with varying degrees of resource allocation both in terms of staff and finance available to support this activity.
 - Development of key relationships with voluntary and community sector organisations are not undertaken in a systematic way often leading to duplication and presenting a risk to reputational credibility.

- Impact

- The lack of engagement infrastructure is currently undermining organisational ability to deliver on key strategic objectives, most notably workstreams to reduce health inequalities. This is in part a consequence of missing processes for sharing information or learning from the insight diversity data from engagement activity with communities.

5. Future State

At a Strategic BET session in April 2024, the Executive Team discussed what is now required to ensure that an organisational approach to engagement activity meets PHW needs.

A summary of the key areas for further focus are listed below, separated into two distinct areas of work:

Ways of working

- To have organisational agreement on a common language and definitions, for engagement including what each step of the spectrum of engagement means in practice for the organisation. This will make it possible to evaluate, audit or report on engagement work and outcomes.
- The need to have clear outcomes which set out what is to be achieved through a more coordinated approach and how this contributes to each of our strategic priorities. This will also facilitate reporting to the Board, in line within the Duty of Quality and the indicator of person-centredness and delivering excellent services.
- The need to have organisationally connected activities to ensure a common approach and methodology through the development of a guiding framework and toolkit.
- Engagement embedded within and not sitting separate to organisational strategies and approaches.

Structure

- The need for an embedded central engagement function one that is linked to existing engagement functions sitting within teams and divisions with a central plan, driven through organisational change principles.
- The exploration of a hub and spoke model structure with the functionality of the hub strengthened and with the ability to mandate and set clear expectations for engagement activity/work. This would be a significant culture and operating shift from the current ways of working across divisions and directorates.

All the above will require a plan to socialise this new approach and model to ensure its success.

6. Conclusion and Recommendations

The work undertaken as a result of the review of OA2E, and the SBET session has led to the work undertaken by the Engagement Team with Directorates across the organisation. This has resulted in clear actions for the way forward to improve the approach, direction and effectiveness of our engagement activity to support our daily work and our long term ambition.

In conclusion key changes are required to our current ways of working to achieve a fully functioning central enabling engagement function, one that needs to be co-designed to ensure the approach is right for PHW.

BET are asked to approve a phased approach to be taken to ensure success through the establishment of a cross organisational working group with senior management support. This will be undertaken between September 2024 to March 2025.

The initial phase would be








- to complete a baseline assessment of engagement resources and activity
- to assess and benchmark the quality of engagement work
- to understand the spectrum of engagement activity taking place in PHW.

This baseline assessment will be undertaken using the EDGE tool, developed by the National Coordinating Centre for Public Engagement (appendix 1) which has been modified to meet our specific needs.

7. Recommendation

The Business Executive Team is asked to:

- Approve the following recommendations:
 - The completion of a baseline assessment between September 2024 and March 2025.
 - Support the establishment of a working group to undertake and guide this work with Executive sponsorship.
- Recommend the submission of this report to QSIC for information.

	Focus	EMBRYONIC 	DEVELOPING 	GRIPPING 	EMBEDDING 
Purpose 	Mission	There is little or no reference to public engagement in the organisation's mission or in other institution-wide strategies.	Public engagement is referenced sporadically within the organisational mission documents and strategies, but is not considered a priority area.	Public engagement is clearly referenced within the organisation's mission and strategies and the organisation is developing an organisation-wide strategic approach.	Public engagement is prioritised in the organisation's official mission and in other key strategies, with success indicators identified. It is a key consideration in strategic developments in the institution.
	Leadership	Few (if any) of the most influential leaders in the institution serve as champions for public engagement.	Some of the organisation's senior team act as informal champions for public engagement.	Some of the organisation's senior team act as formal champions for public engagement.	The CEO acts as a champion for public engagement and a senior leader takes formal responsibility. All senior leaders have an understanding of the importance and value of public engagement to the organisation's agenda.
	Communication	The organisation's commitment to public engagement is rarely, if ever, featured in internal or external communications.	Public engagement occasionally features in internal and external communications.	Public engagement frequently features in internal communications, but rarely as a high-profile item or with an emphasis on its strategic importance.	Public engagement appears prominently in the organisation's internal communications; its strategic importance is highlighted, and resources and strategic support have been allocated to sustain this.
Process 	Support	There is no attempt to co-ordinate public engagement activity or to network learning and expertise across the organisation.	There are some informal attempts being made to co-ordinate public engagement activities, but there is no strategic plan for this work. Some self-forming networks exist, not supported by the organisation.	Oversight and co-ordination of public engagement has been formally allocated (e.g. to a working group or committee) but there is minimal support and resource to invest in activity.	The organisation has a strategic plan to focus its co-ordination, with formal responsibility for oversight of this plan, and resources available to assist the embedding of public engagement. There are a number of recognised and supported networks.
	Learning	There is little or no opportunity for staff to access professional development to develop their skills and knowledge of public engagement.	There are some opportunities for staff to access professional development and training in public engagement, but no formal or systematic support.	There are some formal opportunities for staff to access professional development and training in public engagement.	Staff are encouraged and supported in accessing professional development, training and informal learning to develop their skills and knowledge of engagement.
	Recognition	Public are not formally rewarded or recognised for involvement in public engagement activities.	Some departments recognise and reward public engagement activity on an ad hoc basis.	The organisation is working towards an organisation-wide policy for recognising and rewarding public engagement activity.	The organisation has reviewed its processes, and developed a policy to ensure public engagement is rewarded and recognised in formal and informal ways.
People 	Staff	Few if any opportunities exist for staff to get involved in public engagement, either informally, or as part of their formal duties.	There are opportunities for staff in a handful of divisions or departments to get involved in public engagement, either informally or as part of their formal duties.	There are structured opportunities for many staff members to get involved in public engagement; but not in divisions or departments. There is a drive to expand opportunities to all.	All staff have the opportunity to get involved in public engagement, either informally or as part of their formal duties, and are encouraged and supported to do so.
	Partners	Few opportunities exist for the organisation's partners, such as community and voluntary sector organisations, to be involved in our work.	There are opportunities for partners to get involved, but there is no coordinated approach.	There are structured opportunities for partners to get involved in our work.	Partner involvement is embedded at the earliest stage into plans and strategies. The organisation offers both formal and informal ways to recognise and reward their involvement.
	Public	Little or no attempt has been made to assess community need, or to support seldom heard groups in engaging with the organisation.	Some attempt has been made to analyse community need and interest; and to begin to tackle access issues to identify opportunities for involvement.	The organisation has committed resources to assessing community need, and to using this insight and feedback to inform its strategy and plans. Structured opportunities for the public to be involved exist.	The institution has assessed need and committed resources to supporting a wide range of groups to access its facilities and activities, and to systematically seek their feedback and involvement.

