



Enhancing Consumer Engagement: A Framework for Action

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1. Introduction

Mind has a sustained commitment to consumer engagement. The Strategic Plan 2010–2015 commits to enhancing the involvement of consumers in service delivery and peer support. This document outlines a framework to guide the development of strategies to promote consumer engagement consistent with the key priorities outlined in the Strategic Plan.

The framework provides direction on two interrelated but separate areas for action: consumer experience and the peer workforce that collectively is referred to as engagement throughout the document. It offers a framework for the next stage of development of consumer engagement in the organisation. It is highly relevant to, and consistent with, the Federal Government's agenda on mental health reform which has a strong focus on consumer and peer engagement. The framework is intended to guide investment in consumer engagement over the life of the strategic plan.

This framework has been prepared after consultations with Mind clients, other stakeholders as well as discussions with the following groups:

- Consumer Reference Group
- Focus Groups
- Staff consultation meetings

This input has been very valuable in shaping the thinking behind the proposals outlined in this document.

For the purpose of this framework:

- a. *clients* are people who are receiving or recently have received services provided by Mind.
- b. *consumers* are people with lived experience whose perspectives could usefully inform Mind's operations.
- c. *lived experience* refers to a person who has experienced mental ill health and recovery.
- d. *peer workers* are 'people with a lived experience' who are employed or volunteer to provide services and supports to clients.

2. Context

2.1 Policy Context

Numerous policy documents at a state and national level articulate a commitment to consumer engagement. Important policy documents include:

The National Standards for Mental Health Services (2010) released by the Australian Government. Standard Three states “Consumers and carers are actively involved in the development, planning, delivery and evaluation of services”. This standard is supported by seven criteria. The National Standards are supported by an **Implementation Guideline for Non-Government Community Services**. This guideline document provides further details on ways in which the Standards can be achieved. These documents have been used to inform this strategy.

The Fourth National Mental Health Plan commits to consumer involvement through the development of mental health services.

The Victorian Government policy statement, **Because Mental Health Matters**, commits to ‘Consumer-centered service provision’ and aims for ‘an equal and active partnership between consumers and professionals based on rights and responsibilities, respect and empowerment’.

The South Australian Mental Health and Wellbeing Policy includes eight principles including ‘Consumer and carer engagement is valued at all levels’.

2.2 Organisational Context

Mind has a long-standing commitment to consumer engagement, which it has sought to develop over the past six years. The importance of consumer engagement was recognised in the structuring of the Research, Development and Advocacy Department with the establishment of the Consumer Family and Carer & Peer Engagement (CFC&PE) unit. In addition, the position of Senior Manager was created in 2010 to strengthen the focus on CFC&PE within the organisation. In the 2011/12 budget, the organisation allocated \$425,940 for the functions of this Department. Six staff positions (3.5 EFT) are employed on this function.

As part of the development of PHaMs services, Mind has a conscious strategy of the employment of staff with lived experience of mental health services. Eight peer workers work within the PHaMs program. They undertake similar roles to other workers within the program and seek to enrich their individual recovery practice and their team’s practice with their lived experience.

The Mind Board adopted a Consumer Engagement Policy which articulates the organisation’s commitment to consumer engagement. It states:

Mind will ensure that Mind services are consumer recovery focused, and responsive to consumer needs, thereby achieving improved outcomes for consumers.

Mind will establish multiple pathways through which consumers can contribute to and participate in Mind, ensuring that the views and ideas of consumers of the Service are adequately represented at all levels, from the Board to Mind Programs.

Mind will ensure that feedback regarding the views and experiences of Mind consumers, is sought, and utilised in service planning and development.

*Mind will participate in, and provide leadership to, the PDRSS sector in the development of more consumer focused service delivery.
Mind will assist its consumers to take responsibility for, and be active participants in, their own recovery.*

Key features of the organisation's strategic and service development processes that express Mind's commitment to consumer engagement include:

Strategic Plan

While retaining and strengthening the commitment to a recovery informed approach the Strategic Plan commits to the development of more individually tailored and responsive services.

Area-based Service Delivery

The change from program to area-based services is designed to provide individual flexibility to consumers and to enhance the opportunity for staff to utilise specialist skills and knowledge more effectively and efficiently.

Business model development

Mind is committed to consistent application of evidence informed practice and application of family responsive and trauma informed practice. Within this context Mind is seeking to develop new service opportunities which will require implementation of new business models.

Evidence development and policy influence

Mind is also committed to contributing to the evidence base through research and to using our own practice knowledge to inform public policy and influence public understanding of mental health.

3. Objectives

The objectives of this framework are to:

- Ensure that Mind services are recovery focused and responsive to client needs and support improved outcomes.
- Promote mechanisms which ensure that both formal and informal feedback from clients is gathered, assessed and utilised to inform policy, strategy and practice.
- Establish multiple pathways through which consumers can contribute to and participate in Mind, ensuring that the views and ideas of consumers of services are adequately represented at all levels, from the Board to Mind Programs.
- Engage clients, former clients and other consumers in research and advocacy designed to advance the interests of people facing serious mental health challenges.
- Ensure engagement in, and provide leadership to the development of more consumer focused service delivery across non-government services.

4. Guiding Propositions

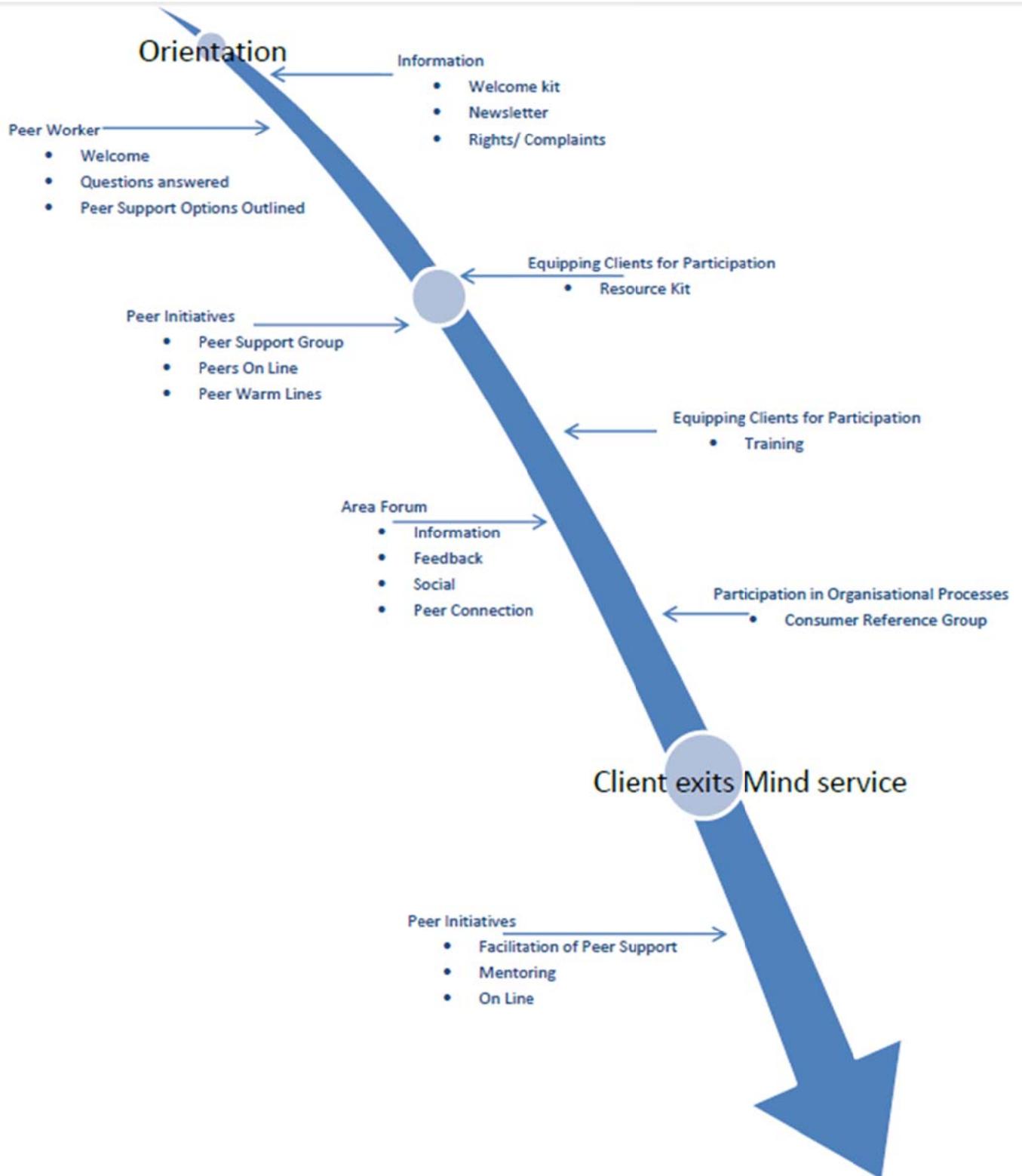
This Consumer Engagement framework proposes strategies for improving consumer engagement at the individual, service and organisational levels.

The thinking in this paper is informed by three guiding propositions:

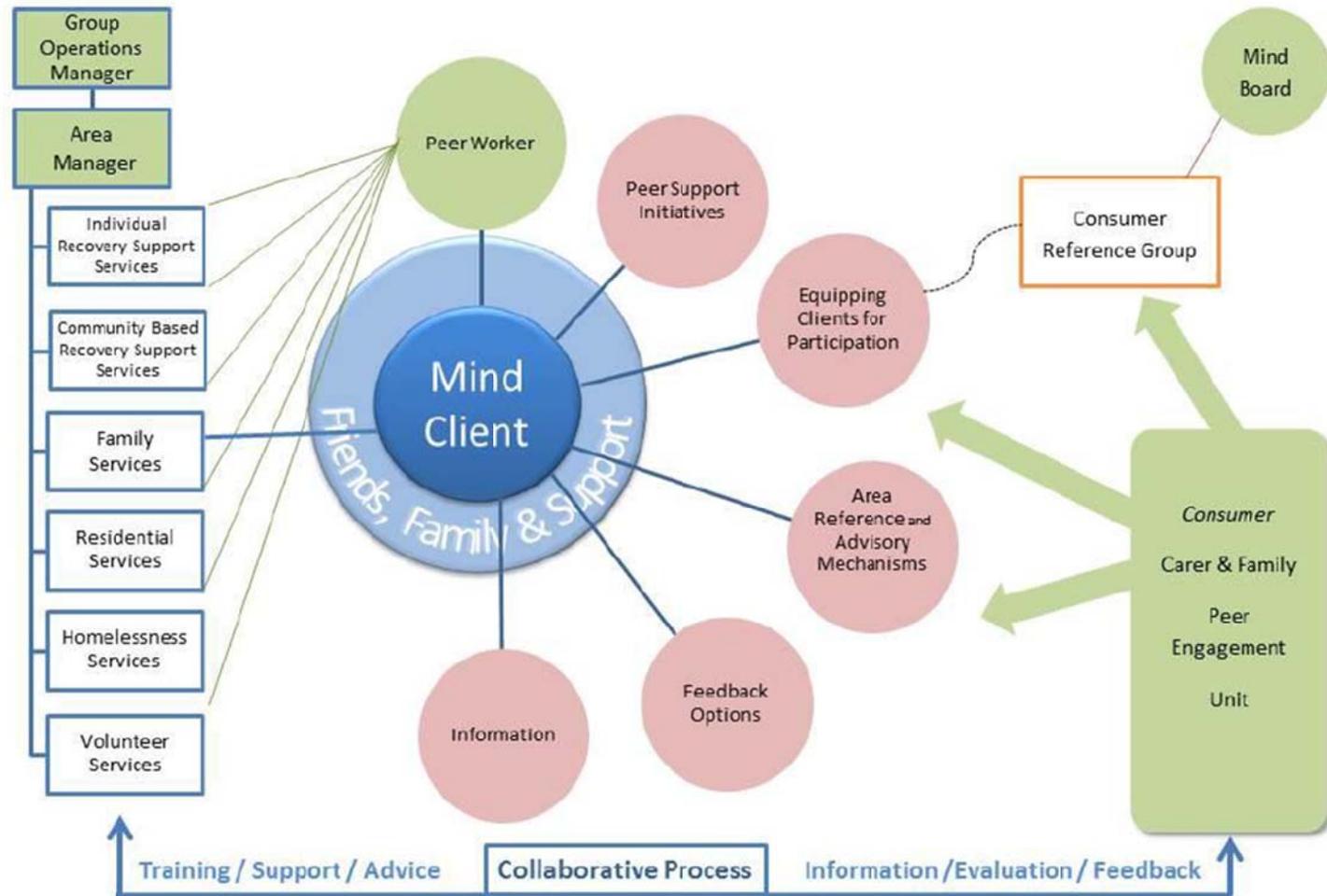
- a. Mind's planning, service delivery and advocacy will be enriched and improved by listening to and being informed by the lived experiences of clients, consumers and their family and carers;
- b. Mind actively seeks client and consumer engagement in the planning, service delivery and advocacy of the organisation.
- c. Mind will support mutuality, self-help and networking amongst clients and consumers of mental health services as part of its recovery goals.

The framework places the client, their friends, family and other supports at the centre of the service delivery and promotes a range of engagement options. Some of these already exist and others will be implemented over the life of the current Strategic Plan. The following diagrams illustrate the desired client pathway as they enter, move through and exit the organisation, and provide an overview of the possible actions that could be used to enhance consumer engagement. These actions are discussed in more detail in the body of the document.

4.1 Consumer Engagement Processes



4.2 Consumer Engagement Process



5. Level of Consumer Engagement

5.1 Individual Level

Improving support to and resourcing of clients

Effective engagement with each client is a core principle of Mind's approach to recovery and needs to be a constant focus in further development of our recovery practices. This needs to be a continuing focus in service development activities. This section details a series of proposed actions to improve consumer engagement at the individual level.

The 2008 evaluation of the Mental Health Experience Co-Design project, sponsored by the Consumer and Carer Research Units at the Victorian Mental Illness Awareness Council (VMIAC) and the Victorian Mental Health Carers Network (VMHCN), demonstrated the importance of supporting and equipping consumers and carers to participate. This project demystified the role of the consumer or carer participant by clearly outlining what they should expect and how they could contribute. It advocated an approach where their voices could be heard and meaningful changes decided on in partnership with the staff of the mental health service.

Engagement is very much an activity of choice. For some clients it is about learning that they have a choice, for others it is about information to inform their decision. Engagement processes range from better understanding their rights and responsibilities as clients, contributing at a service level, at community meetings through to engagement in organisational mechanisms such as the Consumer Reference Groups. Such engagement can be at the informal and formal levels. Mind clients who have an interest in contributing to organisational processes should be supported and resourced effectively to do so. Effectively educating, resourcing and training clients to participate will increase both the level and quality of consumer engagement within Mind and equip clients with valuable life skills.

Access to information is essential in promoting consumer engagement. It enables people to make informed choices and to decide to participate to a lesser or greater degree depending on their individual preferences and circumstances. Mind clients (and their friends and families) need access to information that is relevant and timely to their situation. It needs to be presented in a way that is readily accepted and understood and is supportive of their recovery journey. Information needs to be provided taking into account the diversity of Mind clients across a range of ages, backgrounds, cultures and preferences.

Action 1

Improve the support to and resourcing of Mind clients on consumer engagement activities through the following proposed activities:

Develop training and mentoring package that supports clients to participate in both formal and informal settings.

Support the development of sector initiatives such as the Consumer Skills Bank that train, support and match consumers to paid reference and speaking opportunities.

Develop a resource kit with input from clients to resource clients who wish to participate and contribute to organisational processes. (CRG, local meetings or evaluations).

Improving the quality and distribution of information

Through the consultations undertaken as part of the preparation of this report, feedback from Mind clients and staff has identified the need for a consistent approach to the distribution of information across the organisation. Mind communicates with its clients through its brochures, website and newsletters and through information passed on by staff. A stronger approach to information provision is required.

Information needs to be available in a variety of formats and mediums and adapted to the interests and educational levels of clients. It needs to be engaging, attractive and multi-media in format and adaptable to area and service levels.

The provision of information needs to be relevant and sensitive to timing in the stages of recovery for clients.

The CFC&PE unit will be responsible for inputting into the organisational information and communication strategies and the development of specific client information products. Bringing the client perspective and feedback to the information and communication strategies should be an important feature of the work of the CFC&PE section.

Information packages designed to welcome, resource and equip clients to participate and engage with their recovery and the organisation will be developed to meet this need. *The Vine* is a specific consumer driven communication tool, which has in the past been prepared by the Victorian Consumer Consultants.

In the 2011/12 budget additional funding was allocated to appoint a new editor to take responsibility for the production of *The Vine* as an organisation-wide client specific newsletter. A new editor has recently been appointed and a key priority will be to encourage client feedback and engagement and to prepare consumer focused information. *The restyled* Newsletter could show-case consumer initiatives from all areas of Mind celebrating, communicating and promoting consumers' achievements. .

Another area for improvement is consistency of delivery of the client newsletter. Historically, due to resource constraints, *The Vine* has been distributed through services with staff photocopying from an emailed version and distributing. The Communications Manager will be responsible for ensuring a more professional approach to distribution with all Mind service users receiving a copy of each edition

of the client newsletter either by email or post. Copies will be available in services and be placed on notice boards.

It is proposed that clients exiting a Mind service be given the option of continuing to receive Mind information

Action 2

Improve the quality and distribution of information available to Mind clients through the following proposals:

- Strengthen the client newsletter
- Develop a welcome pack for all new clients
- Provide CFC&PE unit input to the development of information products and services and information access and distribution.

Improving Client Feedback Options

A key objective of this strategy is to establish mechanisms which ensure that feedback both formal and informal from clients is gathered, assessed and utilised to inform policy, strategy and practice. This will involve the CCF&PE unit working collaboratively with Mind clients, other sections within RDA and other Departments to develop and implement a range of feedback mechanisms.

Informal feedback options need to be easily accessible and provide the client with a variety of choices. For example electronic methods such as a feedback screen on the Mind web site, postcards in programs and tear off sections in Mind publications. There also needs to be provision for clients to receive a reply from Mind if requested or to remain anonymous. Systems need to be in place to ensure that all feedback is recognised and forms part of a quality improvement process.

New opportunities for client feedback will be created as various components of the Consumer Engagement Strategy are developed and implemented. Initiatives such as redevelopment of the Consumer Reference Group, establishment of Peer initiatives and the move to Area Reference and Advisory mechanisms will all have feedback as one of their core objectives. The CFC&PE unit will contribute to the development of client satisfaction surveys and use the findings of these surveys in the development of their work program.

Action 3

Increase opportunities for client feedback through the following proposed activities: Participation in the development and evaluation of client satisfaction surveys.

Development of opportunities for formal feedback mechanisms including improved use of technology

Integrate structured feedback into existing quality processes

5.2 Service Level

Developing the Peer Workforce

Mind has had a strong commitment to peer workers for a number of years. It employs eight peer workers in the PHaMs program and values and respects the lived mental health experiences of all staff. Some staff are comfortable disclosing their mental health experiences; others use this to inform their work.

The impact of employing peer workers in Mind has not been formally evaluated but our experience is that this has generally been positive. It has generally been constructive and beneficial for clients, consumers, staff and family and carers. Research and evaluation on the benefits to consumers and the cultural change peer work brings to the mental health workforce is emergent, with the trends indicating positive outcomes as expressed in the following statements:

- Peers possess recovery-prompting skills above those expected from traditional mental health staff;
- Peers report that exercising recovery-prompted skills with others enhanced their own recovery; and,
- Individuals supported by peers improved or maintained their recovery over the four months of the study.

Consideration needs to be given to the workforce opportunities and needs of increasing the peer worker workforce within Mind. Lived experience and competencies and understanding of mental health systems and services are key elements of building effective and client responsive peer workers. Also, consideration needs to be given to the particular employment support needs of peer workers in regard to looking after their own mental health. Work on the development of the peer workforce will be a priority for the CFC&PE section over the next three years.

Mind currently has an established peer workforce. There are opportunities to further develop and enhance this workforce, as well as expanding peer activities. Throughout the consultations a range of possible peer initiatives were identified including:

Peer support Groups – would include clients at various stages of their recovery journey – from those just entering a Mind service to those who have recently left.

Peer-led Groups – community based activities providing peer connections in local areas. The group would focus on recovery, wellbeing, resilience, social inclusion and other areas of interest as initiated by consumers.

Peers on Line – the use of electronic media and web sites to connect consumers.

Peer Warm Lines – a peer run, non-crisis support line. This type of peer support has been shown internationally to be of particular benefit to clients living in rural and isolated areas.

Peer Volunteers – further development of the Volunteer program to investigate and understand the issues for people with a lived experience who volunteer their time to Mind clients.

Action 4

Increase the range of peer activities available through the following proposals:

Further investigate peer support activities and then develop a business case to support implementation of viable activities.

The CFC&PE Unit to consult with and advise Operations and Corporate Services on strategies for the development of the peer workforce within Mind.

Area-based client forums

The introduction of area-based teams is a substantial restructure of the organisation and this framework considers some options for the redevelopment of consumer feedback mechanisms in line with these structural changes.

Client focus groups - conducted as part of the preparation of this report were asked about the idea of an area-based forum for clients. Feedback from client focus groups has suggested the following components for an area forum:

Feedback – suggestion boxes and surveys could be displayed as could games, activities and display boards designed to obtain feedback about local services. This would also be an ideal opportunity to give feedback to the client group on what is being done in their local area.

Socialisation – clients commented on the positive socialising that occurs with clients from across the organisation at the annual AGM. Area forums could be structured to facilitate socialisation and an exchange of experiences from clients across an area.

Information – area forums could provide clients with a way to engage with senior Mind staff for information exchange, questions and clarification. Consumer consultants and CRG members could also be invited to speak and provide information on ways clients can participate within Mind. Community and mental health information could also be distributed. Guest speakers would be an important part of the area forum presenting talks on topics such as but not limited to; recovery, self-determination, employment, housing and hope, spirituality and sexual health. Forums would promote initiatives and showcase the works of consumers/clients and achievements through presentations that include them e.g. from the Ambassadors of Hope, Sprout micro enterprise clients, Viewfinder project to name a few examples.

The use of area-based forums on an on-going basis and for a specific purpose could be part of the strategies that operations managers at the state, group and area levels utilise in the development of area-based services

Action 5

A proposal to progressively establish client forums in area-based services over the next two years

Area-based peer workers

Peer workers within Mind have historically been employed at the service level, predominantly in PHaMs. This was a requirement of the PHaMs funding and has been the only sustainable source of funding for peer workers.

Thinking that has emerged from the work on this report has identified that peer workers could make a valuable contribution through participation at the area as well as service levels. The addition of a qualified peer worker to a Mind area team would support and enhance the delivery of peer related recovery focused activities at a service level.

The peer workers lived experience of recovery value would add to the expertise of the team, with a clearly defined role that enables them to model the values inherent in peer work. Some of the immediate possibilities for the peer worker role include:

Consumer engagement

- Orientation – New clients and staff entering a service in a Mind area receiving orientation to that area by a peer worker.
- Peer Groups – To conduct groups with a focus on recovery, wellbeing, resilience and social inclusion. These will be community-based providing peer connections in local areas.
- Peer workers will have a key role in supporting clients to have input into the organisation at an area level and to provide them with feedback on how that information is utilised.

Distributing information and acting as a resource to clients on feedback options and organisational processes.

Area Team

Using a lived experience of mental ill health and recovery to inform the practice of the area team.

Action 6

Actively explore opportunities to utilise peer workers within the Mind area based structure.

5.3 Organisational Level

Consumer reference and advisory mechanisms

The current consumer advisory mechanisms were established in 2006 and require some review and refinement. The organisation has grown substantially since 2006. In addition, there is an increasing growth in short term interventions and outreach services where the client relationship is primarily with their key workers rather than the organisation as a whole. One of the opportunities and challenges for a consumer engagement strategy is how to ensure effective client engagement in such a large, growing and diverse organisation. In addition, there is a need to consider how input from client engagement mechanisms is considered along with input from family and carer engagement mechanisms.

Within the organisation, there are discrete consumer mechanisms in Victoria and South Australia. In Victoria, the consumer reference group is drawn from clients and former clients. It reports to the Board and there has been a tradition of a Board member being a member of this group and reporting directly to the Board. In South Australia, there is no specific consumer reference group, only a family and carer reference group. The minutes of this group's meetings are tabled at Board meetings. Consumer input is achieved via forums which are called regularly in each region

A key issue that needs to be addressed over the next few years is how our consumer reference and advisory mechanisms should be restructured to ensure:

- Adequate feedback to the Board and management on client issues
- Informal and formal mechanisms for feedback
- More proactive engagement of consumers in service planning and evaluation.
- Adequate client representation that recognises the diversity of Mind clients and the geographical size of the organisation.

At the time of drafting this report, the authors were aware that the Board is currently reviewing its committee structure. Given the focus in Board meetings of reviewing and discussing feedback from the consumer and family and carer reference groups, it is important to also review the most appropriate mechanisms for input and feedback to the Board. This report acknowledges that this is an issue that the organisation will need to address over the next 12 to 18 months.

The Mind Victorian CRG was established in 2005 as one of a number of initiatives to embed consumer engagement within the organisation. It was chaired by the Mind Consumer Consultants and the group membership included current and past Mind Clients and members of the Mind Board with a lived experience of mental ill-health.

Mind South Australia also conducted early work to implement a CRG. The Health Outcomes International report into Mind South Australia Client Engagement (July 2010 reference available on request) outlines the views of Mind clients in SA regarding this work. It was generally considered that the idea of a Consumer Reference Group had merit, however, it was also viewed that such a group should not be too formal but function more like a focus group with a social aspect.

With both the growth of Mind as an organisation and developments in consumer engagement across the sector, the members of the Victorian CRG (VCRG) have raised questions regarding the future role and development of the CRG. These questions echo the voice of South Australian Mind clients. Both groups need to identify a clear understanding of the intent of a reference group and how a CRG would relate in the new area-based structure.

To realise the priorities of the Mind Strategic Plan, it is clear that a single, centralised CRG will not be able to accommodate the size, diversity and geographical spread of the organisation as it moves to area-based structure and individual service packages. The development of the area-based structure provides opportunities for the growth of local consumer reference and advisory initiatives. These initiatives could provide Mind clients with ways to contribute and voice their experiences of Mind services and provide evaluative comment from a local perspective.

Support and incentive for fledgling consumer organised activities is important to the development of a culture of consumer engagement. A key focus of the work of the CFC&PE section over the next three years should be the growth of area-based

consumer initiatives. This may involve an ongoing role for a centralised consumer group that can provide a consumer perspective on local ideas and proposals. The current VCRG needs to reflect on its own growth and experience and consider what changes need to be implemented to enable it to take up this role. The VCRG are currently engaged in this process commencing with a review of their terms of reference. In South Australia, it is proposed that a Consumer Reference Group be established.

Action 7

Enhance state based consumer reference groups to support the implementation of the framework and development of area-based consumer reference and advisory initiatives through these proposals:

Conclude evaluation of current Victorian CRG to establish clear terms of reference as they apply to the new organisational structure.

Establish a South Australian Consumer Reference Group.

Implement recommended reforms to support development of area-based consumer reference and advisory initiatives.

External Representation and Advocacy

Mind should have an external as well as an internal focus in its consumer engagement work. The CFC&PE section participates in a number of state, national and international networks with others involved in building consumer engagement. Part of the unit's role is to stay informed about good and emerging practices, build contacts with key thinkers and consumer leaders and to disseminate information and knowledge learnt to the Board, clients and consumers and within the organisation. Building our knowledge and reputation in being client responsive and engaged is ideologically sensible and commercially sound.

Inclusion of relevant information on consumer engagement and linking clients and consumers to other sources of information through the Mind website will be a focus of the CFC&PE unit over the next 3 years.

This framework also includes a focus on the development and dissemination of consumer engagement information within the broader sector, including within academic settings.

Action 8

Increase Mind's contribution to the development, dissemination and advocacy of consumer engagement strategies through the following proposed activities:

Integrate consumer engagement into the organisation's Research and Evaluation framework

Undertake evaluations of innovative consumer engagement activities (such as the peer training)

Disseminate learning through conference presentations and publications

Build formal relationships with leading consumer organisations nationally and internationally

Sponsor selected clients and consumers to attend national or international forums or conferences.

6. Conclusion

This framework sets out a series of possible actions to be undertaken in the development of consumer engagement strategies within Mind. Some of these initiatives can be undertaken within the scope of existing budgetary allocations. Others would require the development of business cases as part of the budgetary cycle.

Building our knowledge and reputation in being client and consumer responsive and engaged is ideologically sensible and commercially sound. A positive reputation for our sensitivity and responsiveness to clients and consumers with funders, clients and potential clients is an important factor in growing the organisation's business in an increasingly market-based sector and in winning government tenders.

This framework sets out a number of actions for implementation and examination that can assist the organisation in continuing to improve its consumer engagement strategies over the next 3 years.