

# Engagement planning template

## 1. Introduction

This template has been put together to help with planning engagement and involving people in South West London Integrated Care System programmes of work.

Further guidance and resources around planning, and all aspects of engagement, can be accessed via the [toolkit](#)

Plans to engage with the public and patients on SWL ICB/ICP programmes, is supported by:

- People and Communities Engagement Assurance Group (PCEAG) – quarterly meeting reporting into the Integrated Care Board
- SWL Patient and Public Engagement Network – bi-monthly, made up of Engagement Professionals from South West London ICS.

These groups have a wealth of experience around engaging local communities and provide guidance and practical support.

All engagement plans need to be discussed with [XXX](#) so that advice and support can be provided. Some larger scale programmes may also need to attend the PCEAG for further discussion on their engagement plans.

Engagement helps us to understand the needs and aspirations of people, and we should be aspiring to engage local people and communities in all stages of our work.

As set out in [legal guidance](#), there has to be consultation on service changes which constitute a ‘substantial variation’. Although substantial variation is not defined in law, the engagement team and EPG can advise you on what changes could constitute such a variation. This can range from a relocation of a service to a decommissioning of a service. Consultation can range from discussion with the Health Overview Scrutiny Committee to a full public consultation.

Please contact the engagement team [XXXXXX](#) for more information.

## 2. Stage 1: pre-planning

Before embarking or planning any public/patient engagement on SWL ICB/ICP programmes, please complete appendix 1 and arrange to discuss this with the engagement team [XXXXXX](#).

## 3. Stage 2: planning

Once you’ve met/ discussed your project with the engagement team, please complete the planning template (appendix 3).

This includes three key phases:

- Scoping, planning and desktop research
- Implementation
- Analysis, feedback and evaluation

Once completed, arrange to discuss this with the engagement team before starting work.

## Appendix 1 – pre-planning

What are you planning to do?	
Why are you doing it?	
Can the public influence your work?	
If your answer is no, consider what information may need to be shared with patients and the public even if they cannot influence your work.	
If your answer is yes, how do you plan to involve them? Use the options below:	
Gather intelligence	
Understand peoples views, experiences and aspirations	
Understand how current services are performing/ could be improved	
Test and shape some ideas you already have	
Redesigning services/ pathways	
Design something from scratch	
To inform a decision	
Identify priorities or discuss trick trade offs	
Make a significant change to services (like closing, moving or changing the way services are delivered)	
Something else....please describe	
Who do you want to hear from/reach?	

## Appendix 2 – engagement planning template

Name of project:

Project lead:

### 1. Project overview

- A. What the project is about?
- B. What is the project aiming to achieve and why this is a priority?
- C. Who are the partner organisations working with you as part of this project?
- D. What can local people and communities influence and what is fixed?
- E. Which populations, communities and people with lived experience are most likely to be affected and/or interested?
- F. Why do you want to engage people now?
- G. When does this project need to be completed by?

### 2. Level of engagement needed

Are you wanting to...

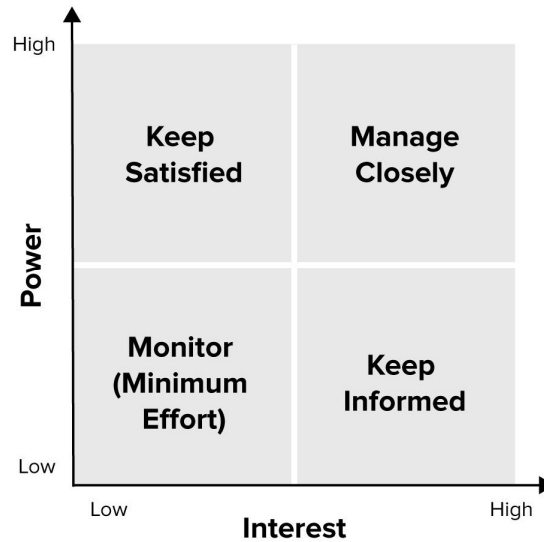
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H. Identify priorities or discuss trick trade offs	
I. Make a significant change to services (like closing, moving or changing the way services are delivered)	
J. Something else....please describe	

### 3. Existing insights

- A. What do you already know about:
  - Your population
  - Service level dataExisting insights from previous engagement work

### 4. Target audiences

- A. Based on your stakeholder mapping, (LINK TO HOW TO GUIDE) who is directly and indirectly impacted by this project?



- B. How are you going to engage with people and communities who experience the greatest health inequalities? (This may include groups such as children and/or young people, working age adults, non-English speakers, people with learning disabilities, and migrant communities, for example)
- C. How will you reach these people and communities? Will you need specialist support to do this? (Have you considered commissioning trusted organisations to reach these communities for you?)

## 5. Engagement questions

- A. What do you need to know from people?
- B. What questions will you ask to find this out? (LINK TO GUIDE ON EFFECTIVE QUESTIONS)

## 6. Engagement methods

- A. How will you engage to find the answers to your questions? (Surveys, focus groups, workshops etc.)
- B. How have you made engagement activities accessible for those you're trying to reach? (Accessible might mean physical access (to a meeting room/ online session or the need for interpreters) as well as psychologically accessible (for those with a learning disability or who have experienced significant trauma)
- C. What existing structures/ networks are you planning to use to reach your target audiences? (Speak to the engagement team to understand what channels are in place)
- D. What resources and support do you need to engage in this way?

## 7. Advertisement and recruitment

- A. How will you be promoting your engagement work to get participants?
- B. Where will you be promoting your engagement work to reach the right audiences?
- C. How will you be recognising people's contribution? (Financially and in other ways)

## 8. Preparing to engage

- A. What materials will you need to be able to engage? (For example slide decks, feedback forms, session plans, pens/ paper etc.)
- B. How will you capture feedback received?

## **9. Analysis and feedback**

- A. Who will/ how will you analyse the feedback you receive?
- B. How will you feedback to those you engaged with? And, how can communities help you do this? (This could be through producing a report, attending meetings to update, creating videos etc.)

## **10. Evaluation**

- A. How will you know your engagement has been effective? (Use our evaluation template [\(LINK\)](#) as well as thinking about your own measures of success)