

Example: Individual conversation guide

This tool will help when planning one to one conversations with people as part of your wider engagement project.

Date of session:

Time of session:

Location of session:

Supporting staff/roles required e.g.

- Facilitator x 1
- Note taker x 1

Materials required

- Any pre-reading that has been sent out in advance
- Equalities monitoring forms
- Consent forms
- Any forms of reimbursement
- Recording devices

Session outline

Timing	Content	Lead
	<p>Welcome and working together</p> <ul style="list-style-type: none"> • Thank the participant for their time • Introduce yourself, and anyone who is joining you • Confirm the expected length of the interview • Explain: <ul style="list-style-type: none"> ➢ How you'll take notes (for example, video recording). ➢ How you'll use any notes you take ➢ If anything discussed leaves participants feeling upset or distressed, explain who they can speak to for support ➢ Ask the participant if they have questions at this time ➢ Seek their consent for any recording ➢ Next steps 	Facilitator
	<p>Setting the context</p> <ul style="list-style-type: none"> • Explain: 	

	<ul style="list-style-type: none"> ➤ The purpose of the conversation ➤ Main topics to be covered ➤ Check in with the participant that they have completed and understood any pre-reading ➤ Refresh the participants understanding of any key areas of the project that are important (i.e. any proposals, ideas, plans that you are looking for comments on) <p>Ask the participant if they have any questions</p>	
	<p>Questions to be explored – Question examples to be added</p> <p><i>When structuring your interview questions, think about the steps in a patient's journey through a service and think about prompting to learn about what's working well and where things could be improved.</i></p> <p><i>As an example, you might ask: What kind of health and care information and support would be helpful for you, and your family? Within this, you could ask when they've needed information and advice, where did they go first of all? How easy was it to find what they needed? What might have made that easier? What happened next?</i></p> <p><i>Try to focus on that person's individual experience; what can we learn from what has actually happened. What does that tell us about our services, and about this person's needs?</i></p>	<p>Facilitator and participant</p>
	<p>Next steps</p> <p>Explain how feedback will inform the project</p> <ul style="list-style-type: none"> ● Each session is being written up ● Feedback from all engagement activities will be reviewed and analysed. ● Explain how findings will be presented – ideally made publicly available and shared with those who gave their feedback ● Outline any further opportunities to get involved (now and in the future) <p>Check if they have any questions</p> <p>Ask them to complete demographic monitoring information/ consent forms – these should be optional but will help understand who you've reached and if there are any gaps.</p>	<p>Facilitator</p>