



Cwm Taf Morgannwg  
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# Top Tips of Engagement

⋮ How to support people  
⋮ to meaningfully engage

# What is engagement?

**Engagement is a powerful process that can lead to improved services and outcomes for people. It ensures those whose lives are affected by the work we do feel meaningfully listened to, and there is a sharing of power and responsibility between those who use and deliver services.**

Engagement is defined as ‘an active and participative process by which people can influence and shape policy and services. This includes a wide range of different methods and techniques (including consultation, participation, and co-production and involvement)’\*

There are many ways to effectively engage people and communities, underpinned by a set of values and principles which ensure that engagement is meaningful, purposeful, and respectful of people’s time and contributions.

The following top tips will help you to successfully plan and deliver your engagement work to ensure the best possible outcomes for both the people you serve and your organisation.

## 01 Be clear on the ‘why’

**Before you begin any engagement work, it’s important to understand why you want to engage and have a clear purpose and rationale for your efforts.**

When we’re unclear on why we want to engage with those who access services, members of the public or people with lived experiences, engagement will become a ‘tick-box’ exercise that leaves people feeling disillusioned and distrustful.

In order for people to meaningfully share their thoughts, ideas, stories and experiences, they need to feel as though they are being taken seriously, and the information they provide will be used appropriately.

## 02 Find ways to engage people creatively

**No one likes filling in surveys and long forms, and often this doesn’t get to the heart of what people really think or feel.**

Consider ways to be creative with your engagement activities. This could be as simple as having large boards for people to write their thoughts on, to using art, poetry, music or drama sessions to allow people to share their feelings in an artistic way. Consider ways for people to share their thoughts anonymously, too.

## 03 Consider how you will reach people — don’t expect them to come to you

**It’s important to consider who you want to engage with, and understand the context of their lives to know how to reach them.**

Putting a survey on social media or basing yourself in a local community centre might yield some results, but typically the people who are least often heard or included won’t engage.

Drill down into your ‘who’ and consider where they might be found. For example, rather than just engaging with people in a certain community area, you might realise you want to hear from young dads aged 18-35 who aren’t engaging with traditional services. Perhaps you will find them at the local football ground, rugby club or cinema.

## 04 Have meaningful conversations

**Human beings are hard-wired for connection, and we all want to feel heard, understood and valued.**

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## 05 Listening to understand

**In today's busy world, active listening has become rare.**

So often we listen to reply, rather than listening to understand, meaning that we are waiting for a gap in the conversation to make our point, rather than truly hearing what a person is saying.

Active listening means listening with all of our senses, being attuned to what a person is feeling, which often leads to a sense of empathy and compassion.

## 06 Managing expectations

**When we engage with people and they tell us something they feel they want or need, our natural reaction is to promise to deliver it.**

Humans are social creatures and we want to please, so it's natural to over-promise when we're in a conversation with someone.

However, failing to deliver on these promises can damage the relationship and sense of trust between people or communities and services or organisations.

It's far better to set realistic expectations and promise to feed back an outcome, rather than promising the outcome itself.

## 07 Avoid using jargon – keep it simple

**Organisations and institutions often use a lot of jargon and buzzwords than means little to people outside of our professional worlds.**

When someone doesn't understand what's being said they can quickly shut down, feeling ashamed and embarrassed that they can't follow along with the conversation, which can lead to frustration, and ultimately, disengagement.

Avoid assuming that people know what these terms mean and find simple language you can use instead.

## 08 Be a human not a job title

**Many people have a complicated relationship with professionals and services, and past experiences (including historical experiences passed down through generations and communities) can have a lasting impact, creating a sense of separation, fear and distrust.**

We are all human, and most of us want the same things in life – to be happy, healthy, prosperous and to be able to look after our families and loved ones. When we approach our engagement work from this mindset, we get a different result than if we assume a position of power because of our job title or profession.

It's still important to maintain appropriate boundaries and follow our organisation's procedures and policies when conducting engagement work, but small changes such as removing lanyards, dressing more comfortably and introducing yourself with your name rather than your job title, can all make a big difference.

## 09 Feedback and Closing the Loop

**No matter what happens as a result of your engagement work, it's important to feed back to the people you engaged with.**

This act of 'closing the loop' means that we are respecting people's time and contributions and demonstrating that we can be trusted to engage with again in the future.

Sometimes, nothing happens as a result of our engagement – the funding is lost, a change of management or focus occurs in our organisation, there is staff sickness, or a whole host of other reasons. It's still important to feed this back and be honest about the situation. People will respect these reasons far more than if they are left in the cold not knowing what's going on.

# Do's and don'ts of engagement



## Do:

- Define a **clear rationale and purpose** for your engagement work.
- **Listen actively** and empathetically.
- **Be respectful** of people's time.
- Consider how you can reimburse or **acknowledge people's time** and commitment if it's appropriate.
- **Feed back to people** after the engagement activity so they know what will happen with the information they've provided.
- **Plan your engagement effectively** to get the most out of people's time and involvement.
- Ensure there's an **exchange of value** – people feel they can benefit from the experience too.



## Don't:

- **Identify what you want to know before you start** – ask open-ended questions and be ready to hear what people have to say, even if it's unexpected.
- **Expect people to come to you** – Consider how you can reach people whose voices are least often heard, and go to the places they will feel most comfortable talking to you in.
- **Over-promise** – set realistic expectations or be honest and say “I don't know if that's possible” if you're unsure, rather than making false promises.
- **Take too much** of people's time.
- **Go back to the same people over and over** – Diverse voices lead to diverse insights.
- **Rush the process** – you may need to engage with people over a long period of time to build a sense of trust before they will answer your questions.

## Stay in touch

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