Remote engagement
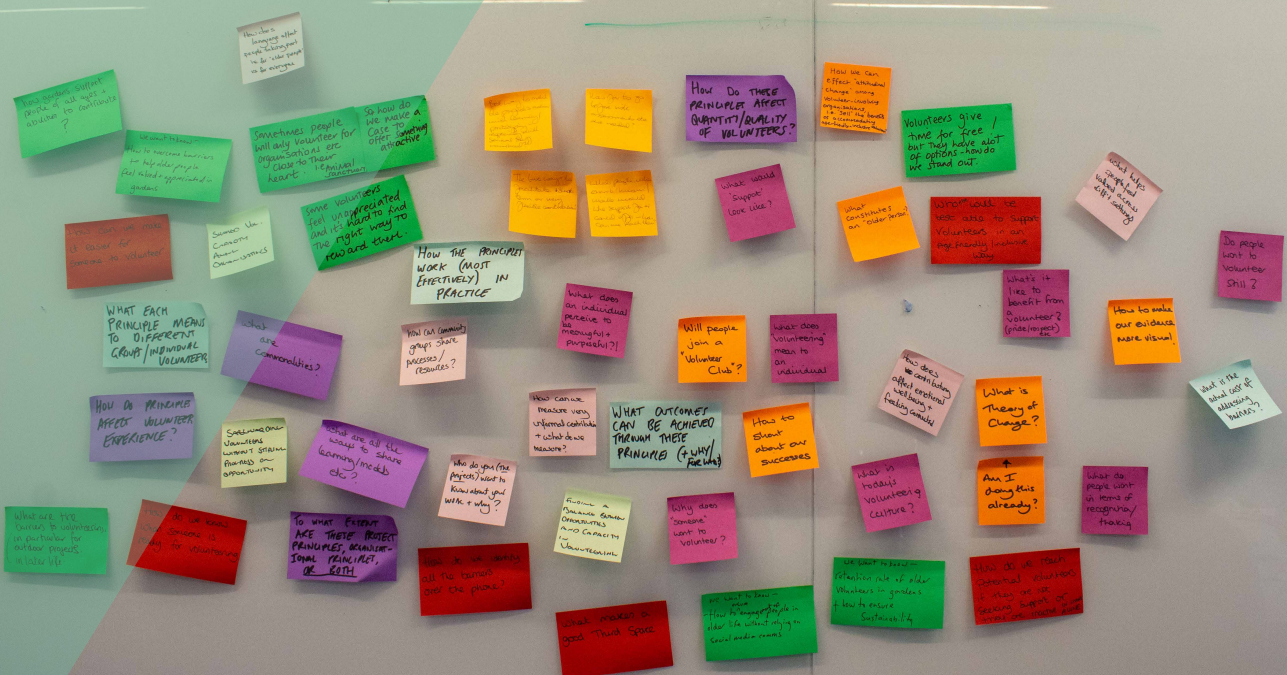
Removing barriers to inclusion in the context of COVID-19

January 2021

in partnership with:

About us

Centre for Ageing Better

The UK's population is undergoing a massive age shift. In less than 20 years, one in four people will be over 65.

The fact that many of us are living longer is a great achievement. But unless radical action is taken by government, business and others in society, millions of us risk missing out on enjoying those extra years.

At the Centre for Ageing Better we want everyone to enjoy later life. We create change in policy and practice informed by evidence and work with partners across England to improve employment, housing, health and communities.

We are a charitable foundation, funded by The National Lottery Community Fund, and part of the government's What Works Network.

Humanly

Humanly is an award-winning design studio specialising in human-centred design for social impact.

We create products, services and systems for organisations that share our commitment to social impact, including national charities, local authorities, central government, international NGOs and UN agencies.

We tackle complex social problems using a participatory design process, engaging users and other stakeholders at every stage through ethnographic and creative approaches that enable meaningful and rewarding experiences for all involved.

1 in 4

people will be over 65 by 2040

Background

In 2017 UK Research and Innovation (UKRI) launched the Industrial Strategy Challenge Fund, with £98 million invested into the challenge on Healthy Ageing in 2020. The Healthy Ageing Challenge supports the government's Ageing Society Grand Challenge mission for people to enjoy five more years of healthy, independent living by 2035 while narrowing the gap between the experience of the richest and the poorest. To achieve this the Challenge asks industry and researchers to develop and deliver products, services and business models that will be adopted at scale which support people as they age. This will allow people to remain active, productive, independent and socially connected across generations for as long as possible.

98M

invested in healthy ageing last year

Community of Practice

The Centre for Ageing Better was commissioned by UKRI to develop the Healthy Ageing Challenge Framework to stimulate ideas and provide thinking points, and to deliver a Community of Practice to support the Healthy Ageing Challenge. The Community of Practice is a learning community that brings together organisations with an interest in developing solutions that support people to age well. It is a space for members to collaborate, problem-solve and share their expertise, learnings and insights, through activities including workshops, conferences and an online resource library.

Introduction

In the wake of the COVID-19 pandemic, many organisations and businesses have had to rethink their user interactions through adapting to remote engagement methods. In this paper Humanly and the Centre for Ageing Better share experiences of shifting approaches, to ensure that people with lived experience are involved in meaningful and inclusive ways.

A key focus of the Healthy Ageing Challenge projects is user engagement, with an expectation from the outset that solutions would be developed through co-creation and an iterative process to create solutions that address the real needs of end users. This was supported through a Community of Practice workshop on remote user engagement delivered by Humanly in July 2020 for the seven Trailblazers projects, which were the first to be funded by the challenge in 2020 and are its largest element.

This paper, which has been developed for use by members of the Community of Practice, aims to outline what user engagement is and the benefits it can bring to businesses and organisations. It sets out advice on approaching this remotely and draws on examples of best practice from the innovation and ageing community.

The COVID-19 pandemic brought with it challenges for user engagement as we knew it. It has made it impossible to use some of the face-to-face methods that many organisations traditionally use. In many areas it is not currently possible to go to people's homes, have direct face-to-face contact with people or spend time immersed in their daily lives.

In this paper we share some key learnings from this period around adapting engagement methods in order to generate rich insights whilst working remotely, including case studies from a range of fields showing this in practice.

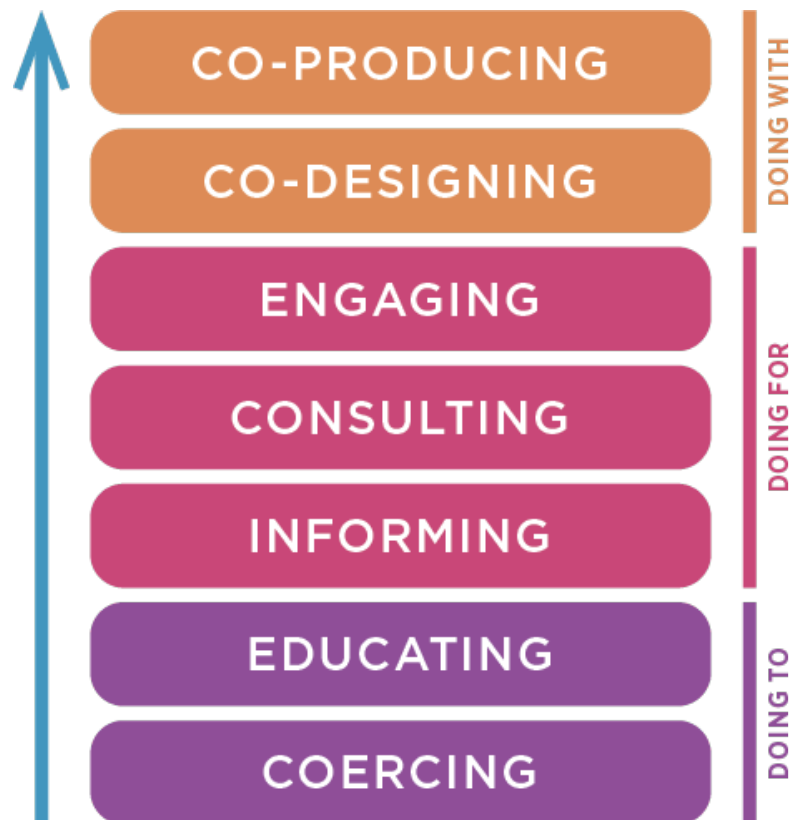**We will outline the benefits of user engagement to businesses and organisations**

User engagement and participation

What do we mean by 'user engagement'?

There are many terms used when talking about user engagement for the development of a new or improved product, service or system.

A widely used term in this context is co-production, however with the increasing use and profile of the word 'co-production' there is also increasing misuse. To understand what co-production is, it is important to understand what it is not. The term co-production is sometimes used when describing other approaches such as consultation and co-creation. Clearly showing the difference between co-production and these related, but different, approaches is important if real co-production is to be put into practice.

The Ladder of Participation

Source: https://www.iriss.org.uk/resources/insights/participation-its-impact-services-and-people-who-use-them

Co-production

There is not one definitive definition of co-production, however definitions tend to agree that co-production is an equal partnership where the people who will be using a service or product are not only involved in sharing ideas but have equal decision-making power throughout both design and delivery. This is the definition we use to describe co-production throughout this paper.

In the context of healthcare, co-production has been described as 'the interdependent work of users and professionals to design, create, develop, deliver, assess and improve the relationships and actions that contribute to the health of individuals and populations'.
(Batalden M. et al. (2016), Coproduction of healthcare service, BMJ Quality & Safety, 25:509)

Co-creation

A distinction has also been made between co-production and co-creation (also known as co-design). In co-production, people who use services take over some of the work done by practitioners. In co-creation people who use services work with professionals to design, create and deliver services.
(Cottam, H. and Leadbetter, C. (2004) Health: Co-creating services (Red Paper 01), London: Design Council, cited in SCIE Guide 51; Co-production in social care. What is it and how to do it)

The goal is to co-create value by getting input from users, beginning to end. All key stakeholders are involved in co-creation, including target users, service providers, commissioners, experts, developers, and so on.

Consultation

Consultation gives users of services or citizens the opportunity to input into the development process by providing their feedback, experiences and/or ideas at a particular point or points in the process, often in response to a proposed change. The involvement of citizens or service users is also usually limited to specific elements of the design or development work. Decisions and delivery are then likely to be made by professionals.

Co-create value by including users beginning to end

Trailblazer case study: Business Health Matters

Business Health Matters (BHM) is a collaboration between Active Lancashire and The University of Central Lancashire (UCLan) focused on workplace health and enabling people to live healthier working lives. The project will see a training package developed that will provide people working in gyms and leisure centres with the skills to conduct health screenings in workplaces.

"It became clear that a larger number of one-to-one interviews were needed, taking place outside standard working hours"

The impact of the pandemic meant that BHM had to shift all planned consultation from face-to-face to remote engagement and alter timescales to accommodate plans. In order to reach local businesses and hear their views on workplace health, a survey was undertaken. An online survey was emailed out, promoted both via social media and in partnership with the local Chamber of Commerce, with some paper surveys also distributed, resulting in 138 responses. Focus groups had originally been scheduled following the survey and had to be moved to take place via Zoom. Four of the six planned workshops took place via Zoom but it became clear that with the challenges the businesses were facing, greater flexibility was needed, leading to a larger number of one-to-one interviews, taking place at times convenient to businesses including outside of standard working hours.

Engagement also took place with leisure centre professionals, comprising an introductory webinar, follow up survey, and two online focus groups to test aspects of the plans, where interactive tools such as Mural were used. Participants were set a task to complete before attending the focus groups which helped them to come focused and ready to participate, with an understanding of the purpose of the session.

Approaches to remote user engagement

User engagement work, whether co-production, co-design, or consultation, entails working with a wide range of people from different walks of life, who might not have access to a computer, laptop or smartphone. Not all remote engagement methods need to be digital or require the internet, allowing practitioners to tailor approaches to the individual's needs, especially in regard to technology and internet access. Below we outline seven approaches to think about when considering remote engagement:

Break down the barriers to digital engagement

Digital engagement is the primary method many organisations are currently using to undertake remote co-creation. However, it is important to assess whether your participants are comfortable using digital engagement and identify any potential barriers. In the first instance, establish if they have the required equipment (e.g., laptop/tablet/mobile phone) and if so, if they are confident in using the software you are considering using.

Where digital engagement is being used but some participants are less confident with the technology required, this can be overcome through techniques including:

– Offering one-to-one training to participants in advance of calls so that they can practice in a private environment and get comfortable with the tech ahead of time.

– Allowing additional time (up to 20-30 minutes) prior to a workshop for people to join online and get comfortable.

– Ensuring one-to-one support is provided to reach out to any participants struggling to join the call during the session.

– Providing a phone number ahead of workshops, and displaying on screen throughout, which anyone who is struggling with the technology being used can call for instant support. This requires a facilitator who is there purely for tech support and means participants can be quickly supported and issues resolved.

Identify potential barriers to digital engagement

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Consider alternative methods to user engagement activities

There are many ways to carry out user engagement activities at every stage of your project, aside from moving your one-to-one or group calls online. For example:

– Mapping someone's journey through a service, which would usually be done with Post-it notes can be done over the phone, and the answers put into a spreadsheet or digital whiteboard such as Miro or Mural. This can be posted to the person to look over, and a follow up conversation used to elaborate further.

– Card sorting, for example could be conducted by moving 'cards' around in an interactive environment such as a Google Slide or a digital whiteboard.

– Postal kits are a great way to conduct engagement offline and enable participants' equity of involvement. For example, a diary study can be conducted by providing a paper diary, disposable camera or Dictaphone along with printed instructions.

– Feedback on ideas for new forms of support can be gained via an online survey that can include concept sketches, storyboards and videos.

Identify and breakdown barriers in participants' living environments and other commitments

When conducting remote engagement, it is also important to consider the person's living environment and the barriers they may face, for example, whether there are other people at home, and how loud and busy the house is. When would be the best time for the individual to engage with an activity, is it when they have a break at a certain point in the day from any caring responsibilities they may have or when they can get out of the house and go for a walk? When working with business owners, feedback shows that being flexible and conducting workshops or interviews outside of business hours may increase participation rates. Some residents may feel uncomfortable at the idea of opening up their home to strangers via a video group call, and will feel reassured and more ready to participate if they are reminded at the start of sessions that they have the option to turn their camera off.

Amongst the limitations of meetings via platforms such as Zoom are the fact that it can take longer to build rapport between participants (and with the facilitator), and that in larger groups it can be difficult for an organic discussion to flow. By factoring these limitations into planning they can be overcome, for example, by starting engagement activities earlier in the project; holding several sessions rather than just one; and using break out functionality or meeting in smaller groups to better aid the flow of discussion.

There are many ways to carry out remote user engagement at every stage

Trailblazer case study: Blackwood Neighbourhoods for Independent Living

Blackwood Neighbourhoods for Independent living (BNIL) builds upon existing award-winning work in developing the highly accessible Blackwood House and CleverCogs™ digital care and support system. BNIL will be co-designed and co-created with citizens across three demonstrator neighbourhoods who are encouraged and rewarded to take an active and informed role in their own ageing journey and to support others within the neighbourhoods. Each neighbourhood will consist of a range of innovative products and services, each scalable and translatable, that combine to create a supportive and sustainable, economically active and healthy place.

Blackwood were originally going to deliver face-to-face workshops but due to the COVID-19 pandemic this was moved to an online format. The project benefited from expert advice around the design of their virtual engagement, from Professor Stephen Osborne of the University of Edinburgh.

Initially the project held workshops with residents from each neighbourhood, beginning with an open discussion around common complaints of ageing. The next stage saw thematic workshops bring together residents from across the different neighbourhoods. Blackwood's

approach brought the same group of residents back together consistently, which helped build a social aspect and saw participants feel increasingly comfortable to share their thoughts and feelings with the group as they built relationships and developed as a new 'virtual community'.

One of the biggest challenges Blackwood faced was around recruiting participants who were confident online, and worked hard to upskill participants and put contingency measures in place. Over several years prior to the pandemic Blackwood had invested heavily in digital skills training for their residents and having a team of digital skills trainers able to support the virtual engagement was an invaluable asset. Leaving space at the start of workshops - sometimes of up to 30 minutes - to allow people to be supported to get online and providing one-to-one technical support to troubleshoot issues ensured that technical barriers to participation were largely eliminated.

Blackwood were flexible in their approaches, adapting as they went and responding to feedback. This included reducing the number of staff attending workshops to ensure residents' voices were not diluted; following residents' preferences around whether they participated in group or one-to-one sessions; and adapting the use of Mural to be staff-led after testing this with groups.


"Blackwood were flexible in their approaches, adapting as they went and responding to feedback."

Case study: Designing new forms of employment support for over 50s in Greater Manchester

Humanly was recently commissioned by the Centre for Ageing Better, in partnership with Greater Manchester Combined Authority (GMCA) and the Department for Work and Pensions (DWP), to co-create and prototype new approaches to supporting people aged 50 to State Pension age into work in Greater Manchester.

In this project co-creation was conducted in three areas of Greater Manchester - Manchester, Trafford and Wigan - with a range of stakeholders, including people with lived experience, service providers and employers. Co-creation activities were designed to be conducted remotely in line with COVID-19 restrictions, whilst enabling meaningful, enjoyable and accessible experiences for a wide range of participants with different needs and preferences.

A range of activities were carried out with people with lived experience using offline and online methods. These included asking people about their job seeking journeys and working lives to date, as well as creating opportunities for people to imagine ideal scenarios for their lives and what support they would need to achieve these ambitions.
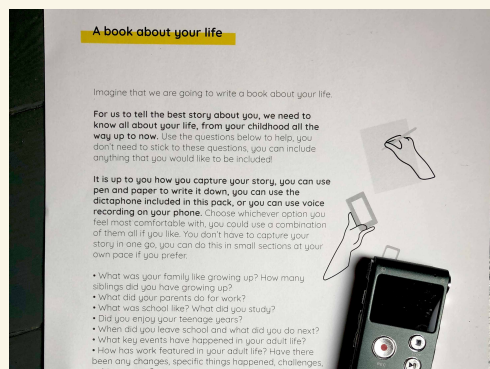
"Co-creation activities enabled meaningful, enjoyable and accessible experiences, and did not rely on digital literacy"

Co-creation methods that did not rely on digital literacy and access included a storytelling activity where people were asked to imagine their life is being made into a book, and to provide content for this. Participants were given the choice of writing their story down or recording it on a Dictaphone, which was provided to them along with a stamped addressed envelope for them to return it.

Several activities used visual templates to capture people's ideas, including their aspirations for their ideal life over 50 and how their expectations and realities might impact on these ambitions, and also to capture peoples' 'ideal job' and 'ideal support'. All of these activities were posted to participants, with instructions and templates designed to be clear and intuitive.

Adapt your delivery to make it as accessible as possible for participants

From the outset, consider how adapting delivery can support, and even increase participant engagement. The delivery of sessions online and timescales to consider for remote engagement are likely to be different to that of a face-to-face workshop. If you are running sessions online, consider creating shorter sessions to help people stay focused, and consider your timing, allowing them to join in around other life commitments. For longer engagement pieces, letting the participant complete these in their own time can allow for more individual reflection and could help mitigate any pressure of them having to provide an instant answer.

Also consider how you may need to adapt language and literacy in your remote engagement plans. For those whom English is a second language, consider translating posted activities or involving a translator in discussions. Where literacy could be a challenge keeping the language simple and using tools such as picture cards could work well.

Weigh up whether group or one-to-one engagement is most suitable

Group environment vs one-to-one engagement is also important to consider. One-to-one activities have the benefit of ensuring you hear each individual's voice and opinions. However, group environments are good at encouraging conversation and helping spark ideas that are prompted by others to broaden people's thinking. Group conversations and creative activities can be facilitated online via Facebook or WhatsApp groups, online forum discussions and group video calls. These enable a group dynamic where participants are able to build on each other's responses, as well as offering participants the opportunity to share and hear from other people with similar experiences to themselves.

Use partner organisations and social media to amplify voice and reach more people

Undertaking remote engagement potentially requires the user to come forward themselves more, for example, there is less of an option to attend an existing group and run a session with a captive audience. Networks are therefore increasingly important in order to reach out and recruit participants. Using social media and working with community groups, membership organisations and business networks to recruit participants can help with this.

Consider setting a short and simple task ahead of time

Giving a task for people to complete beforehand can help to focus engagement and make interactions more productive. For example, giving participants a short brief to read before a meeting, or setting them some questions to consider beforehand means people are more likely to understand the purpose of the activity and what you are hoping to achieve from the session.

Group conversations and creative activities can be facilitated online

Social networks are increasingly important for reaching and recruiting participants

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Case study: Exploring people's lived experiences of infant feeding in low-income households

Humanly recently worked on a project with Guy's & St. Thomas' Charity exploring infant feeding in low-income households in Lambeth and Southwark, as part of the charity's childhood obesity programme. This research aimed to build a deep understanding of the underlying barriers and motivations associated with breastfeeding and healthy infant weaning. To achieve this, remote user engagement was conducted with 12 families. A mixture of offline and digital remote activities enabled rich insights to be generated during the national lockdown.

"Participants were engaged offline with a physical kit containing hands-on activities and instructions, and followed up by a telephone interview"

For the families in this project, offline engagement methods were the most appropriate for most participants. Many did not have access to computers or tablets and had limited internet connectivity. Offline engagement was achieved through the development of a physical kit containing hands-on activities and instructions, which was posted to participants. The posted activities included a card sorting activity, social network mapping activity and local area mapping activity. Once participants had received the kits, calls were arranged to answer any questions they had. Participants then completed the activities and sent photographs of the results to the Humanly team. All of these activities were followed up with a telephone interview to discuss what each participant had captured, to get more context and the meaning behind their responses, and to build a richer picture of their experiences.

In terms of digital methods, selected participants with smartphones and internet access were asked to take part in a diary study for two weeks, sending in videos, photos, audio and text (depending on what they were comfortable with) in response to questions and tasks about their feeding habits and environments. This allowed for in-depth insights over a period of time, with questions and tasks being tailored to individuals based on the content they were sending.

Looking forward: what can we learn from the pandemic about remote engagement?

Remote engagement will not fully replace the need for face-to-face engagement, however it has demonstrated some strengths, and proved very valuable in times of limited human contact. Some learnings that we have identified include:

- Interacting differently, for example, through postal kits and digital diaries, has allowed for more open and relaxed conversations in some cases. Instructions must be clear, ideally with illustrations. Combining this with a phone call helps ensure each participant fully understands what they need to do.

- Creating hands-on activities that people can complete in their own time encourages more creativity with people's responses.

- Digital diaries have enabled longer engagement and observation periods, which can take place over weeks rather than just hours with face-to-face methods.

- Undertaking engagement with the same group over a sustained period of time, ideally in smaller groups helps develop a sense of community and allows people to increasingly open up.

- Checking participants' preferences rather than making assumptions, especially around digital engagement, will produce more meaningful and ongoing engagement.

- Investing in digital skill training support over a sustained period can have a huge pay-off in both the short and long term – for both the project and participants.

Remote engagement has effectively allowed people with lived experience to continue to be involved in inclusive and meaningful ways. Moving to this way of working during the pandemic has highlighted the potential for remote engagement methods to be used, to better understand people's lived experiences and uncover insights that may not be as easy to capture through face-to-face engagement methods. Having a mixture of remote methods alongside face-to-face engagement methods in the future will be a powerful way of developing solutions that are best suited to the users involved.

Interacting differently allows for more open and relaxed conversations

Let's take action today for all our tomorrows.
Let's make ageing better.