



**Scottish Accessible
Information Forum**



Guide to User-Led Reviews

A supplement to the SAIF Standards for Disability Information and Advice Provision in Scotland



The Scottish Accessible Information Forum

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SAIF

Scottish Consumer Council, Royal Exchange House,
100 Queen Street, Glasgow, G1 3DN

Tel: 0141 226 5261

Fax: 0141 221 0731

Text: 0141 226 8459

Email: info@saifscotland.org.uk

Website: www.saifscotland.org.uk

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1. Purposes of a user-led review

1. To assess the service provided against the expectations of disabled service users.
2. To identify gaps in the service.
3. To review and refine the existing services.
4. To develop new service delivery methods.
5. To make service users and staff aware that the views of service users are important.
6. To demonstrate that service users can affect service planning and development.

2. Checklist for planning and practical arrangements

Ensure that the review team:

- is representative of a broad range of disabled people,
- is well-organised and clear about the objectives,
- has identified and allocated all tasks,
- has suitable premises with adequate facilities in which to meet,
- has access to administrative support and materials,
- has necessary support workers and materials for those team members who require them,
- has effective systems for keeping everyone informed about decisions and actions.

Ensure that the questionnaire:

- covers every issue you want to address with service users,
- is very easy to use for both the review team and service users,
- is produced in appropriate alternative formats,
- can be completed by service users in as many ways as possible – for example, at home then posted to you, by meeting with you, by telephone, by email etc.,
- is accompanied by a clear explanatory leaflet.

Ensure that for the interviews:

- you are taking every possible step to encourage people to participate, by:
 - being as flexible as possible in terms of where, when and how interviews can be carried out,
 - meeting people's costs and transport requirements,
 - ensuring the availability of signers, interpreters, and any other supports which people may need,
- interviewers meet during the process to review progress and take steps to improve quality and consistency, and to share ideas and observations,
- note-taking is timely and efficient.

If review team members are visiting people or meeting people at various locations in the community:

- identity cards with a photograph should be carried,
- street maps should be carried,
- access to necessary facilities should always be possible – for example, adequate toilets and transport,
- use of mobile phones should be considered,
- they should always be able to contact each other and should arrange to do so regularly,
- they should have cash to cover any likely expenses,
- they should have note-pads, clipboards and pens.

Ensure that the final report:

- reflects the results of the review briefly and accurately,
- is presented to service users and other interested parties,
- is presented effectively to the service management,
- is used as a tool for change, and followed up by the review team with timescales and review meetings agreed with the service management.

3. Recruiting a review team

The process and the team must have a leader. This can be someone from within the organisation or an external person brought in for the purpose.

The role of the team will be to plan, organise, carry out and conclude the review process. Not all team members need be involved in all those stages, but it is important that it is a collective process.

The team should be mainly disabled service users and staff. In addition there may be others who could be invited to join, such as a director or management committee member, someone from another relevant agency and certainly someone from a local disability forum or similar organisation – perhaps to represent potential service users.

Ensure that the team includes:

- disabled service users,
- if appropriate, a representative of disabled people who potentially could use the service.

Don't exclude people who may need to be accompanied or represented by a support worker, personal assistant, family member or advocate – for example someone with a significant communication impairment.

The team should include disabled people whom the service specifically targets, or if the service provides general information and advice then the team should include disabled people with a range of physical, sensory and learning impairments. Ensure the group reflects your users and potential users and includes young and older people and people from a black and minority ethnic background.

If possible, recruit a group which includes people who:

- have used your service in different ways or have a range of experiences of your service,
- are available to make a contribution, with support and guidance if appropriate.

Devise a process which offers people the opportunity to learn new skills and gain new experiences.

It is also important to consider skills required, such as:

- being able to work as part of a team,
- considering the views of others as well as your own,
- being aware of the need for discretion and confidentiality.

We suggest an initial planning meeting is held, to which all appropriate service users, or at least a group who could potentially join the review team, are invited. At the meeting:

- establish the aims and objectives of the exercise,
- establish that the process is designed to encourage disabled people to make demands upon the service and participate in ongoing improvements,
- outline the process and work required,
- seek the agreement of some of those present to join a review team.

Membership of seven or eight is probably the maximum for a review team, three or four perhaps the minimum. It is the range and quality of the membership which matters and its suitability for meeting the needs of your agency and your service users. Some team members may be very involved in planning and carrying out the work, others may have a more consultative function. People need to be able to contribute what they can.

4. Getting organised

Develop a plan and timescales for the work. Meeting at a regular time and day each week is likely to help. More time will be needed as the work develops, so review your meeting plans regularly.

Delegate effectively. Determine through honest discussion who can or wants to carry out each area of the work. Most of the work will be done between meetings. The interviews will need to be organised to suit the people you want to interview.

Arrange access to a computer and administrative support for those who need it. Determine a system for managing paperwork. Losing or not being able to identify paperwork properly can waste so much time and energy.

Make sure that everyone is kept informed about decisions. Note all agreed actions. Send out notes or minutes as soon as possible.

5. Identifying service issues and factors

Remind yourselves as a group of the purposes of the user-led review.

Have a wide-ranging discussion to identify what issues and resources the review team think are important if they and other disabled people are to be able to use your service.

Key issues are likely to be:

- accessibility of information,
- accessibility of premises,
- friendly and professional staff,
- flexibility of the service,
- accuracy of information and advice.

Consult the SAIF Standards, in particular the section **Disabled People and their Representatives**. This section outlines the service disabled people should be able to expect, and is also available in a separate booklet.

Note all the issues which you agree on and decide are important. That list will form the basis of your questionnaire.

6. Organising a questionnaire

First of all consider how many people you want to participate in the review process and who they are. Will you invite people in for an interview or visit them in their homes or elsewhere? Will you send out questionnaires for return by post? Will you use a mixture of these methods?

Another option is to organise small groups of service users to complete questionnaires together. Remember that not everyone will be able to read a questionnaire, so other methods will need to be used.

You need to include a question about every issue you have identified as important - and yet keep the list of questions as short as possible. Also, keep each question as short and clear as possible. See the sample questionnaire on page 15.

Don't just consider the questions you want to ask, but also the people you will be asking. The questionnaire must suit them as well as you. At this stage think about who you are going to be sending questionnaires to and/or interviewing.

Plan to consult all the disabled people who use your service, or if that is not possible then a selection of people with different impairments. Plan your use of alternative formats, signers and interpreters. These are issues which may impact upon the design of your questionnaire.

Produce a leaflet to accompany the questionnaire which explains to everyone involved what it is you are doing and why. Design it as an invitation to participate. Include the purposes of the work. Explain that the completed questionnaires are confidential.

Explain how you intend to use the views of service users and protect them in terms of confidentiality, anonymity, and the Data Protection Act.

7. Organising the interviews

Interviews can be very useful but they are time-consuming and you may decide only to use a postal questionnaire. Another option is telephone interviews, but face-to-face interviews will provide better information. The best method for your organisation may be small group interviews.

If you are going to proceed with interviews, consider the following:

- Decide how many people you intend to interview, and how you are going to select them. Ideally it should be people who have used the service for a substantial enquiry or used it on a regular basis. Alternatively you can simply ask people in the questionnaire if they agree to be interviewed, so it becomes a self-selecting process. A combination of selection processes is probably ideal.
- Decide who is going to conduct interviews. Not everyone will be comfortable with the task, not everyone will be suitable for it. Decide who can or will interview whom, matching interviewer to interviewee may be very important.
- Consider whether to have two people interviewing. This can create a more conversational and relaxed setting, and one person can lead the interview whilst the other takes the notes, or take over if the other person is finding it difficult.
- Consider training. Ensure that people have the skills for interviewing or are given help to acquire them. Draw up interview guidelines.

The practical arrangements are very important, pay attention to:

- meeting people's costs,
- transport requirements,
- venue suitability for interviews,
- times which suit each individual,
- being flexible in terms of how interviews are conducted, perhaps using an audio tape or braille questionnaire. Always consider accessibility issues for review team members and interviewees. For example, will you need to use a sign language or community language interpreter?
- the possibility of approaching people who used your service in the past or who may use your service in the future but do not use it at present,
- if you plan to interview people away from the office consider safety issues – see the checklist on page 5.

Most of all be flexible in every way you can to meet the needs of the people you plan to interview. Make the process as easy as possible for them.

The questionnaire is the agenda. It is important to get all the questions answered and to achieve consistency. However, there is nothing wrong with completely different approaches to each interview in order to meet the needs of the individual. Be conversational. If someone deals with a topic during conversation, skip the question.

After the first few interviews, interviewers should meet and discuss how it is going. Consider what is working and what is not in terms of interview approaches and practical arrangements, and make adjustments if necessary. Consider the questions and how they are phrased, and again, make adjustments if necessary.

Tidy up your notes as soon as possible after the interviews. If getting them typed, get it done quickly.

8. Analysing the information collected

The review team should continue to meet during the period when questionnaires are being returned and/or interviews being carried out. It is important to share ideas and observations about the information being collected and collated. These observations are important and should be noted separately. They should also form part of the final report along with the information collected directly from the users. The process will also help everyone involved in collating the information from the questionnaire returns and interviews.

List the answers to each question in the questionnaire and then summarise them, indicating the numbers of returns which support each summary.

Identify a person or a few people who will then turn the summaries into a draft report which can be discussed, revised and agreed on.

9. Feeding back the results and implementing change

Give the report to the service management and arrange to meet with them shortly afterwards.

The report should identify which aspects of the service the users value and are very satisfied with, and which they are not satisfied with. It should also indicate what changes have been suggested and where there are gaps in the service provision or delivery methods.

Agree a timescale with the service management for them to consider the report and cost and programme the changes and improvements. Meet again to discuss and seek to agree their proposals. Agree a timescale and a future meeting to review progress, perhaps in three, six or twelve months, depending on the nature of the work involved.

It may be useful to invite service users to a meeting at this stage so they can hear directly about the proposals and add any further comments or ask questions. It may be useful to do this at an AGM or Special General Meeting, inviting service users and others such as funders.

Give a summary of the review team report and the management proposals to all the service users who completed questionnaires and/or were interviewed.

We suggest a user-led review is carried out on a regular basis, perhaps every three to five years, to check that what you are doing is working.

10. Sample questionnaire

The following is a list of questions you could include in the questionnaire. Obviously there are likely to be others depending on the type of service you provide.

Wherever possible each question should only need a “yes”, “no” or “not sure” answer. Where appropriate allow space, usually just two or three lines, for comments and suggestions about any service gaps or shortcomings – as shown in questions two and three below.

1. Do you know what services we provide?

Yes / No / Not sure

2. Is the service physically accessible to you?

Yes / No / Not sure

Comment/Suggestion

3. Is the inside of the building accessible and adequate for you?

Yes / No / Not sure

Comment/Suggestion

4. Is the service available at times that suit you?
5. Is the service flexible enough in terms of how, when or where it is provided?
6. Have you found that staff have the knowledge to meet your needs?
7. Have you found that staff have appropriate attitudes – are they helpful, polite, and sensitive?
8. Has information been available in the formats you need?
9. Has the information or advice you have received been accurate?
10. Has the information or advice you have received been independent?
11. Has the service been provided to you in a confidential way?
12. Has the information or advice you have received met your needs?
13. Has the service done what it said it would do? For example, written a letter on your behalf or phoned you back with information gathered.
14. Has the service done what it said it would do in the agreed timescale?
15. If you have asked for information which the service holds about you, was it provided?
16. Have you ever found that staff cannot deal with your enquiry or refer you to an agency which can?
17. If staff have referred you to another agency, has that agency been able to help you?
18. Have you ever found that staff cannot remember or find information about an earlier enquiry you made which you need to follow up?

19. Have you ever complained?
20. If you have complained, have you found the complaints system to be satisfactory?
21. Do you feel well-informed about any changes to the service or plans for future changes?
22. Do you feel properly consulted about any changes planned for the service?
23. Do you feel that if you have anything to say about the service you are listened to, have an influence, and continue to feel comfortable using the service?
24. Any other comments?

11. Background information

For the first time, comprehensive Standards for Disability Information and Advice Provision in Scotland were published in 1999. Because of higher than expected demand, they were reprinted in 2001 and 2003, and revised and reprinted in 2004 and 2007. Copies continue to be available **free** from the Scottish Accessible Information Forum (SAIF). Alternatively they can be downloaded from the SAIF website at www.saifscotland.org.uk.

This Guide to User-Led Reviews is designed to:

- assist agencies to get feedback from disabled people about the accessibility of their services,
- assist agencies to test the success of their implementation of the SAIF Standards.

Like the SAIF Standards, this guide:

- stresses the requirement to involve disabled people in the review, planning and development of services,
- is designed to encourage disabled people to make demands upon service providers, and to participate in creating improvements to services.

There is no substitute for the involvement of disabled people themselves, and this guide reflects that assertion.

The implementation of the Disability Discrimination Act, the establishment of the Disability Rights Commission, and more recently the introduction of the Disability Equality Duty encourage greater accessibility. The Care Commission now asks for accessible information policies and practices, and the SAIF Standards continue to have a key role in all these developments.

The Standards are intended to assist agencies in the voluntary, private and statutory sectors to ensure that disabled people can access effective information and advice services. They remain innovative and unique in the field and were developed following extensive consultation with service providers and disabled people.

The Standards are written to be relevant to all agencies, large and small, urban and rural, specialist and general. In addition, limited resources should not be seen as a reason for not striving to meet high standards. Innovative practices can achieve a great deal, many of the standards requiring only the will of the agency.

SAIF recognises that disabled people access information and advice from a range of types of agency. This includes those that specialise in impairment issues, generalist information and advice agencies, and those where information or advice is only part of their work. The SAIF Standards are designed to be applicable to all, and so is this guide.

It is important that the Standards are not seen as providing a maximum level of service, but a framework for continual improvement. Future developments in agencies need to be informed by the aspirations of disabled people themselves.

This guide suggests a process which should achieve exactly that if implemented on a regular basis such as every three to five years, and one which can easily be incorporated into broader accreditation and quality management systems.

12. Feedback

SAIF is always keen to hear your views about its publications. Please email any comments you have on this guide to info@saifscotland.org.uk, use the feedback form on our website at www.saifscotland.org.uk, or write to us.

13. Acknowledgements

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Cover illustration by:

Paul Mudie, FAIR Multimedia, 95 Causewayside,
Edinburgh, EH9 1QG
Tel: 0131 662 1962
Email: fair@fairadvice.org.uk