

Find out  
what people  
really want

the  
socialising  
and tea!

short breaks fund easy consultation toolkit



**SHARED CARE**  
scotland



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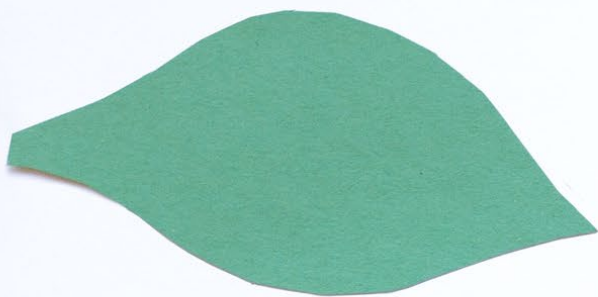
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# Foreword



I am very pleased to be writing this foreword to such an important new resource that aims to help short break providers engage their stakeholders in the ongoing development of services.

From the outset we wanted the Short Breaks Fund to be more than just a grant-making programme. We wanted the fund to inspire lots of new thinking around how short breaks are planned and delivered to ensure we are achieving the best outcomes possible with the resources available. We also wanted the fund to create legacy through the creation of a range of 'tools' to help services convert this thinking into practice.

We have been delighted by the enthusiastic response to this side of the fund and we are hugely grateful that so many people are willing to contribute their valuable time to share learning. The development of this 'Easy Consultation Toolkit' is a fine example of what can be achieved by working together, and our thanks go to everyone on the development group.

Of course consultation is never 'easy'. However I'm sure the many creative approaches contained in the toolkit will make the exercise less daunting and perhaps even fun! There's no question that the effort expended will be more than exceeded by the valuable ideas and insights that will be gained.

Don Williamson  
[Shared Care Scotland](#)



## Acknowledgements

**We are very grateful to the 'Think Tank' members who created this toolkit:**

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Su Millar, LifeCare Edinburgh  
[www.lifecare-edinburgh.org.uk](http://www.lifecare-edinburgh.org.uk)

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[www.cornerstone.org.uk](http://www.cornerstone.org.uk)

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# How to use the toolkit

## First, plan your consultation

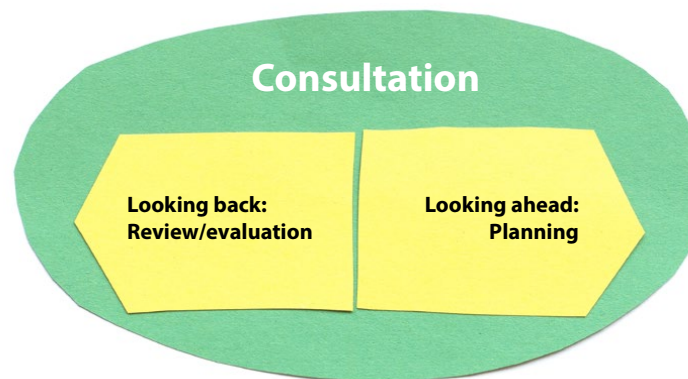
Effective consultation involves more than asking people to choose from a limited set of options.

Most people place consultation on a spectrum of different degrees of involvement. For example, the [International Association for Public Participation](#) lists a continuum of: **Informing, Consulting, Involving, Collaborating and Empowering**. The simplest spectrum we found was in [VOICE](#) from the Scottish Community Development Centre: **Inform, Consult, Engage**.

For the purposes of this toolkit we define consultation as a process that involves looking back (review, evaluation) as well as ahead (planning). It can involve a range of stakeholders and be used for a variety of reasons, from informing to engaging / empowering.

Rather than duplicate existing work on the principles of consultation, this toolkit focuses on a set of adaptable, practical tools.

The tools have been tested in a range of short break settings, by people who commission and provide breaks, including local authorities, short break bureaus, carers' centres, Community Health Care Partnerships and carer-led organisations. The consultations mostly involved carers, but the tools were also used to consult people with support needs, other organisations, colleagues in different departments, strategic planning groups and so on.



## Top tips for a successful consultation

Before you select any of the tools in this kit, it is vital that you are clear about some fundamental principles and questions, including:

- What is your consultation about? Who decides this?
- Why are you are doing it?
- Who you need to involve?
- How will you make sure people can make informed decisions?
- What will you do with the results?
- How will you share them with the people you consulted with?

To help you answer these questions and plan an effective consultation, we strongly encourage you to use [VOICE](#), a free and easy-to-use tool for planning and reviewing any consultation. This will help you make more informed decisions about which tools best suit your needs.



There are many valuable resources out there to help you learn more about the principles and practice of meaningful consultation.

You can find some of these in [Other sources of information, toolkits and standards - Page 38](#)

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# Introducing the keywords

Each tool in the toolkit is classified by a number of keywords in four categories to help you find and choose the right tool for your circumstances. The four categories are:

- Why you are doing it
- Who you are going to be consulting with
- How many of them there will be
- What resources you have available

## Why

These keywords help you select different tools based on your reasons for doing consultation.

- **Generating ideas:** getting new ideas, suggestions etc.
- **Gathering information:** getting evidence about topics including need, issues, opportunities etc.
- **Refining:** Improving ideas and honing in on options
- **Prioritising and decision making:** Identifying what matters, selecting from a limited range of options

## Who will you be consulting with?

The toolkit is primarily written for people consulting with carers, though some tools will also be useful for the people they care for. Within each of these there will be:

- Adults
- Children
- Young people
- **People with communication needs:** Most of the tools are generic, useable in any setting, but some tools are highlighted as particularly relevant for people with communication needs

## Tool info

### Why do this

Generating ideas  
Gathering information  
Refining  
Prioritise/decision

### Who for

Adults  
Children  
Young people  
People with communication needs

### How many people

1-2 people  
Small group 3-15 people  
Large group 15+  
Large audience

### What's needed

Facilitation skills/facilitator  
Special setting  
Computing

### Proportion of time needed



## How many people will you be consulting with?

- **1-2 people:** For example in one-to-one meetings or telephone calls
- **Small group 3-15 people:** A small group meeting
- **Large group 15+ people:** A larger group, but still meeting in the same place at the same time
- **Large audience:** Consultation with a larger number of people who might not be in the room with you, for example using electronic surveys

## What resources you will need

- **Facilitation skills/facilitator:** Not necessarily an external or specialist person, but someone who has the skills to facilitate group meetings or events
- **Special setting:** Some of the tools need a particular space or room layout to work comfortably
- **Computing:** Computers and/or internet access are needed for these tools

## Proportion of time needed

Depicted visually as a spectrum this helps you see relatively how much time the tool needs for preparation, delivery and analysis.

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# The tools

The following pages contain a range of tools for consulting on short breaks. We have tested most of them in short break settings and have listed some of their advantages and limitations.

But remember that consultation tools that are useful in some settings might not work in yours. Be prepared to test and adapt the tools for yourself. Many of the tools include short, real life case studies to help get you started.

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# Keyword chart

	Keyword: Why				Keyword: Who				Keyword: How Many				Keyword: What		
	Generate	Gather	Refine	Prioritise	Adults	Children	Young People	Comm Needs	1-2 People	Small Group	Large Group	Large Audience	Facilitation	Special Setting	Computing
Video diaries Page 8	✓	✓	✓		✓	✓	✓		✓					✓	✓
World Café conversations Page 9	✓	✓			✓	✓	✓				✓		✓	✓	
Appreciative Inquiry Page 10	✓	✓	✓		✓	✓	✓			✓	✓		✓		
Writing on the Wall Page 11		✓		✓	✓	✓	✓			✓	✓			✓	
Postcards Page 12		✓			✓	✓	✓	✓				✓			
Life stories and timelines Page 13		✓			✓	✓	✓	✓		✓			✓		
Creative suggestion boxes Page 14	✓	✓			✓	✓	✓	✓				✓			
Electronic polling Page 15		✓	✓	✓	✓	✓	✓	✓		✓	✓				✓
Quizzes and games Page 16	✓	✓	✓	✓	✓	✓	✓			✓	✓				
Orange game Page 17	✓	✓			✓		✓	✓		✓	✓		✓	✓	
Voting Page 18				✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	
Picture based consultation Page 19		✓	✓	✓		✓		✓	✓	✓			✓	✓	
Telephone interviews Page 20	✓	✓	✓		✓				✓				✓		
Using physical space Page 21		✓	✓	✓	✓	✓	✓	✓		✓	✓			✓	
Social media Page 22		✓	✓	✓	✓		✓					✓			✓
Focus groups Page 23		✓	✓		✓	✓	✓	✓		✓			✓		
Questionnaires Page 24	✓	✓			✓	✓	✓		✓	✓	✓	✓			
Online questionnaires and surveys Page 25		✓			✓		✓					✓			✓
My break planner Page 26	✓	✓		✓	✓	✓	✓	✓	✓				✓		

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## Tool Video Diaries

### What it is

**An opportunity for people to record comments onto a video camera, usually in a private space.**

### How to use it

Video Diary (or 'Big Brother') rooms are often used during conferences or day-long events, as well as clubs, to let people share feedback at any time, not just at the end.

Set up a room or a private space where people can go when they want to share some feedback with you. The room will contain a video camera and sometimes a list of topics or questions you want people to focus on.

You can simply leave the camera running, provide instructions or show people how to start it when they are ready. Some projects have a worker on hand to operate the camera, but this can be off-putting and unnecessary if the equipment is easy to operate.

Alternatively, you can ask people to share feedback using videos on their own phone or tablet and send them to you.

After the event, the recordings can be viewed and analysed, even edited to create promotional films or case studies for evaluating the service.



### Advantages

- Allows people to share their comments as they occur
- Although it's not anonymous, feedback is often freer because the audience/interviewer isn't in the room at the time

### Limitations

- You need to make sure people know how to use the technology
- You need to ensure you have enough film or memory, and this may need to be checked from time to time
- Until people get used to it, they often need reminders or encouragement to use it

## Tool info

### Why do this

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

### Who for

- Adults
- Children
- Young people
- People with communication needs

### How many people

- 1-2 people
- Small group 3-15 people
- Large group 15+
- Large audience

### What's needed

- Facilitation skills/facilitator
- Special setting
- Computing

### Proportion of time needed



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## Tool

# World Café Conversations

## What it is

A way to explore questions in depth using group discussions.

## How to use it

Ask people to get into small groups of people (4-5) to discuss a given topic for 20-30 minutes. Encourage people to record their own ideas (don't leave it to just one person).

After 20-30 min each group nominates someone to stay where they are while everyone else moves to another group.

Ask the groups to share the main ideas, themes and questions of the last group, encouraging people to link and connect ideas coming from their previous conversations.

Give each group a new topic of conversation and allow them to talk for 20-30 mins before moving on and repeating the process.

After several rounds of conversation, invite people to come back to their original group to reflect on themes that have come up, knowledge gained and possibilities for action.

More information and free resources are available here [www.theworldcafe.com](http://www.theworldcafe.com)

## Case Study

*'With good preparation and the right questions, World Café Conversations can be a really engaging way to consult. It has the added benefit that participants can network and learn from each other, so it does not feel like it is a one-way consultation.'*  
Shared Care Scotland

For the full story of this tool in use, see [Page 33](#)



## Advantages

- Everyone is involved and has a chance to put their opinions across in a variety of ways – including in small groups, feedback to the wider group and in writing
- Allows in-depth exploration of topics
- New ideas are often generated by people sparking off each other
- It's commonly used, so people are increasingly familiar with what's expected

## Limitations

- It requires clear instructions at the start
- It requires a confident facilitator as it can be hard to stop conversations once they start!

## Tool info

## Why do this

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

## Who for

- Adults
- Children
- Young people
- People with communication needs

## How many people

- 1-2 people
- Small group 3-15 people
- Large group 15+
- Large audience

## What's needed

- Facilitation skills/facilitator
- Special setting
- Computing

## Proportion of time needed



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## Tool

# Appreciative Inquiry

## What it is

**A strengths-based approach to developing services based on what works.**

## How to use it

The philosophy behind appreciative inquiry is that questions are framed in a positive way, rather than taking a problem solving approach which assumes something needs to be fixed. So instead of asking what was wrong with something and how do you make it better, you ask what worked well and envision what could be.

The model uses a four or five step approach, usually these:

### 1 - "Define" the question

Define the question you want to consult on in a positive way – e.g. "What was good about last year's trip, and what is our vision for this year's trip?"

### 2 - "Discovery"

What has worked well in the past or what is currently working well?

### 3 - "Dream"

How can you build on what was identified in the discovery phase? What could the future look like?

### 4 - "Design"

What systems, funding, staffing will be needed to make the ideas identified in the dream phase a reality?

### 5 - "Deliver"

Implementing the systems, funding and staffing identified in the design phase.



## Advantages

- Builds on what has worked in the past, so new ideas are grounded in reality
- Helps people to feel safe while exploring what can be improved
- Encourages ownership

## Limitations

- It can take time for people to understand that looking for positives isn't about ignoring negatives

## Tool info

### Why do this

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

### Who for

- Adults
- Children
- Young people
- People with communication needs

### How many people

- 1-2 people
- Small group 3-15 people
- Large group 15+
- Large audience

### What's needed

- Facilitation skills/facilitator
- Special setting
- Computing

### Proportion of time needed



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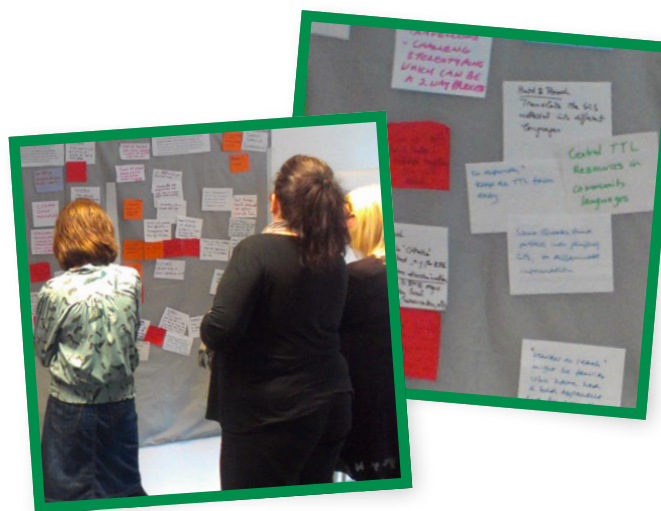


## Tool

# Writing on the wall

## What it is

A range of visual methods to record and sort responses to a consultation.



## How to use it

Ask people to write their ideas/ answers to a question on pieces of paper and then stick them on to a wall.

The answers can be left as they are or can be moved around to show groups or themes emerging.

Answers can be written on anything and attached to the wall with tape, Blu Tak, pins etc. You can also use sticky paper (e.g. post it notes) or sticky walls (by spraying a piece of material with Spray Mount adhesive and attaching the fabric to the wall)

'Talking walls' and 'graffiti walls' are similar but answers/comments are written directly onto the wall or paper.

## Advantages

- Supports creative thinking
- Useful for people who think visually - people see the effect of moving or removing ideas
- Can be quick - useful to capture people's views as they go past (e.g. in a reception)
- Answers/ideas can be anonymous
- Answers can be drawn - useful if writing is an issue
- People can write short or more detailed answers

## Limitations

- Because it is participatory, it can feel a bit chaotic
- You need sufficient pens – pens mean power!
- Takes time to transcribe answers if you want to keep a record of the consultation

## Case Study

'Participants took responsibility for writing down important points from the conversation, and these were then put on the sticky wall for all to see...It was helpful to have this input in such an engaging way, and decisions regarding priorities seemed to flow from the discussions.' Shared Care Scotland

For the full story of this tool in use, see [Page 33](#)

## Tool info

## Why do this

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

## Who for

- Adults
- Children
- Young people
- People with communication needs

## How many people

- 1-2 people
- Small group 3-15 people
- Large group 15+
- Large audience

## What's needed

- Facilitation skills/facilitator
- Special setting
- Computing

## Proportion of time needed



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## Tool Postcards

### What it is

A creative way to support carers to plan or review a short break using postcards or pre-paid envelopes.

### How to use it

In planning, carers might be asked to imagine they are on a short break:

- Where would they like to send a postcard from?
- Who would they like to send it to?
- What would they be doing?
- What would be on the front of the postcard?

Discussing the answers to these questions might help a carer consider what they want from their break.

Reviewing their break, some providers leave blank pre-addressed postcards at the venue and ask carers to return the postcards with comments on the break.

You could ask people to send a photo of what they enjoyed, which could make the tool accessible for people with communication needs.

### Advantages

- Easy to use
- Immediate feedback on the short break

### Limitations

- Not all short breaks involve going away from home
- Need to provide an envelope if sensitive information is going to be shared
- Cost for purchasing postcards and stamps



## Tool info

### Why do this

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

### Who for

- Adults
- Children
- Young people
- People with communication needs

### How many people

- 1-2 people
- Small group 3-15 people
- Large group 15+
- Large audience

### What's needed

- Facilitation skills/facilitator
- Special setting
- Computing

### Proportion of time needed



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## Tool

# Life stories and timelines

## What it is

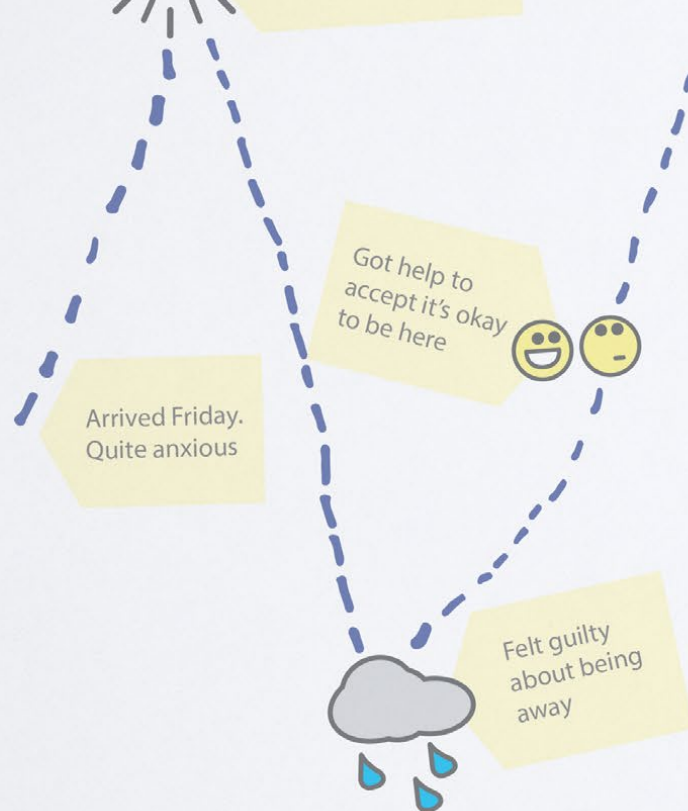
A way to get balanced feedback on the highs and lows of a project or short break.

## How to use it

This is what one project did to produce the lifeline as part of a group activity:

1. Each person in the group drew their lifeline on a piece of flip chart paper, highlighting the highs and lows that they experienced during a short break weekend.
2. They explained the causes of the highs and lows using symbols or words. You could also provide photos, pictures, magazines, etc for the person to choose images to relate to highs and lows.

3. Each person presented their chart to the group. Then the other group members asked questions. The project worker also asked questions and took notes of the conversation. This allowed carers to discuss what they had gained from the weekend, and the project workers to think about what could be improved for a future short break.



## Advantages

- Shows a journey and allows 'ups and downs'
- Powerful method of looking at carers' needs and how the break helped the person

## Limitations

- Usually takes a few minutes for people to understand the idea
- Needs careful management, for example to help people consider how much personal information they want to share

## Tool info

## Why do this

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

## Who for

- Adults
- Children
- Young people
- People with communication needs

## How many people

- 1-2 people
- Small group 3-15 people
- Large group 15+
- Large audience

## What's needed

- Facilitation skills/facilitator
- Special setting
- Computing

## Proportion of time needed





## Tool

# Creative suggestion boxes: fish, wells, trees and scrapbooks

## What it is

A range of ways to replace traditional suggestion boxes, with interactive ways to capture people's views on, or aspirations for, a short break service.

## How to use it

It can be a two or three dimensional tool. Some services find it helps when people who use services are involved in creating it. Once it is made, it can be positioned in a public place for people to write or hang their wishes on.

Different adaptations include wishing wells, trees, or even a wish fish!

Another example is using a scrapbook, where people can stick pictures or write about their ideas for short breaks.

## Advantages

- Encourages people who might not normally get involved in consultations
- Ensures standardisation across several areas or services
- Anonymous, so people can share private ideas they might feel uneasy saying in front of others
- Having something to touch is helpful for some people
- Questions can be tailored

## Limitations

- There could be feedback which is unfocused or needs further explanation; this would not be noticed until the answers are compiled
- It has to reach the target audience and should be placed in prominent venues to ensure that as many people as possible take part.
- Compilation of answers is a manual process which takes time and resources

## Case Study

Aberdeenshire Council undertook a consultation during 2011 with people who used learning disability services. A 'Wish Fish' was placed in various centres, material and pens were available near to the fish.

Once someone has written down their views they tie it to the fish. When everyone has done this, the material covers the whole fish which looks like their ideas are scales.

## Tool info

## Why do this

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

## Who for

- Adults
- Children
- Young people
- People with communication needs

## How many people

- 1-2 people
- Small group 3-15 people
- Large group 15+
- Large audience

## What's needed

- Facilitation skills/facilitator
- Special setting
- Computing

## Proportion of time needed





## Tool

# Electronic polling

## What it is

**A range of tools that allow people to vote on options by using computers, text messages, or small handsets.**

## How to use it

Like any consultation, you prepare your questions in advance. Using your preferred system, you show the questions to people and ask them to select their response. The results are usually available immediately and can be shared or discussed with your audience as well as being saved for analysis later.

The examples below have been used by the authors of this toolkit. However other examples are available and it is worth shopping around.

Qwizdom is based on electronic handsets. The simplest handset allows questions with four types of answer: yes/no; true/false; multiple choice; five point scale.

At the time of writing the toolkit, prices we were quoted ranged from £766+Vat for a kit with 8 handsets to £1594+Vat for 30. Further information is available here: [www.qwizdom.com/corporate/home](http://www.qwizdom.com/corporate/home)

Poll Everywhere is a surprisingly simple online system where your questions are displayed in a PowerPoint presentation and people send their answers by text message or online (e.g. using a PC or smartphone). Basic accounts are free, though responses by text message cost as much as a normal text and you need internet access while using the poll.

## Case Study

*Our electronic polling session began with a few “ice breaker” questions, to get the young carers smiling and get familiar with the handsets. Following that they were asked a variety of questions regarding the types of activities they had been involved in during the previous year. The participants enjoyed seeing their responses on the screen, and became quite involved, watching the countdown until everyone had answered. There were also benefits to the workers as well, as the work of collating the responses was all done for them, and the results could be produced in a variety of formats, including graphs and tables.*

Angus Carers Centre

## Advantages

- Relatively quick and easy to set up
- Analysis reports can be designed to meet the needs of the service
- Respondents can remain anonymous
- Novelty factor makes it an interesting choice (particularly for young people)

## Limitations

- Can be expensive
- Limitations on the types of questions that can be posed
- Some people are frightened of technology
- Technology sometimes fails – always have a back-up plan in case things go wrong
- You need to get participants in the same place at the same time

## Tool info

### Why do this

Generating ideas

Gathering information

Refining

Prioritise/decision

### Who for

Adults

Children

Young people

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### How many people

1-2 people

Small group 3-15 people

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### What's needed

Facilitation skills/facilitator

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### Proportion of time needed



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## Tool

# Quizzes and games

## What it is

A way to make consultation more enjoyable by building consultation questions into quizzes and games.

## How to use it

There are lots of ways to create quizzes and games. A good one is to build them into other group activities or events you have planned. It's amazing how quickly ideas develop once you get started if you let them flow.

## Adapt ideas from quiz shows

You will be able to think of your own ideas, but here are a few to get you started:

- 'The Chase' – people can ask YOU questions, e.g. about what your project is doing or planning, then they can say what they think about it and if they feel your answer is right or wrong.
- 'Million pound drop' – helping put people's decisions/choices in perspective. Allow people to choose different options, each of which has a cost attached. How

much money/resources are left after making different choices? What does this mean for what they want to prioritise?

- 'Pointless' – if you want to generate new ideas, split people into competing teams to come up with suggestions, with more points being awarded for new and unusual ideas, less for the 'usual' suggestions or answers.

## Adapt ideas from board games

**Monopoly.** One group wanted to find out how much value carers placed on different activities the group runs. They displayed a list of the different activities and asked carers to place different amounts of Monopoly money on each activity, based on how highly they value it.

## Case Study

No Limits created a consultation based on roulette.

*'Encourage honesty and frankness and don't be afraid to try something different.'*

For the full story, see the case study on [Page 32](#)

**Snakes and ladders.** Play the game in the normal way, until a dice lands on a snake – then the player has to answer a consultation question!

## Advantages

- Fun
- It's easy to explain the rules if people are familiar with the format already

## Limitations

- Remember to focus on what you're trying to find out – don't get too carried away
- Test it out first to make sure it works

## Tool info

## Why do this

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

## Who for

- Adults
- Children
- Young people
- People with communication needs

## How many people

- 1-2 people
- Small group 3-15 people
- Large group 15+
- Large audience

## What's needed

- Facilitation skills/facilitator
- Special setting
- Computing

## Proportion of time needed



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## Tool

# The Orange Game

## What it is

A game that is played to find people's views on up to six different topics. This example is adapted from a 'Partners in Practice' event in Dundee.

## How to use it

Each person has their own orange with six empty segments, printed on an A4 Sheet.

The facilitator discusses each topic one by one, for example:

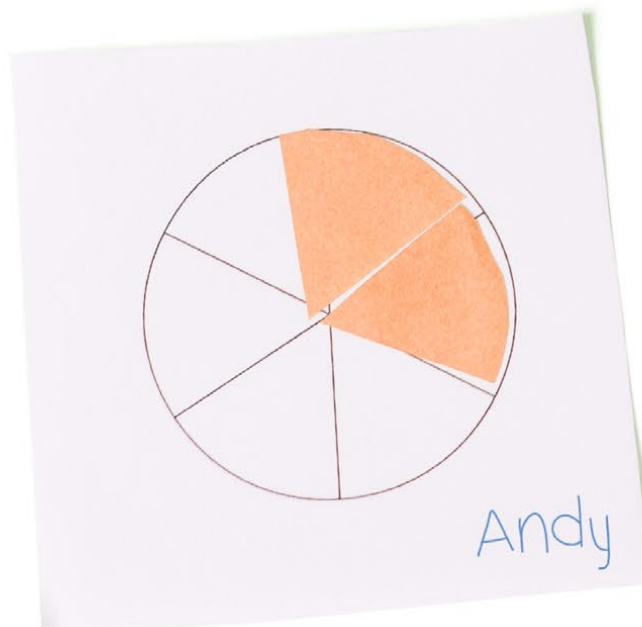
- Feeling informed
- Taking time out from my role as a carer
- The benefits of a short break
- Feeling better supported
- Partnership with services
- Having a say in services

For each topic, the facilitator asks what it means to a person. When someone gives an answer, they get a triangle, one of the segments of their orange.

Each person has the opportunity to give an example for each segment. It's a game where everyone should win, by having all six segments of their orange filled in.

In our real-life example, this was a good way to get the views of a number of people with a learning disability. People sat around small tables and discussed their answers with each other and a note taker. It got quite noisy!

This could also be adapted for a small group planning a break, whereby the orange is divided into as many segments as group members. Each member gets to contribute a 'segment' by saying what is important to them about the break.



## Advantages

- Allows everyone to voice their opinions
- A range of topics can be explored
- Enjoyable group activity
- Adaptable - could be used for making a personal plan or designing a short break

## Limitations

- Needs careful planning and explanation
- Needs facilitation and ideally note takers at each table
- Risks excluding someone who doesn't or can't give a view on a topic

## Tool info

## Why do this

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

## Who for

- Adults
- Children
- Young people
- People with communication needs

## How many people

- 1-2 people
- Small group 3-15 people
- Large group 15+
- Large audience

## What's needed

- Facilitation skills/facilitator
- Special setting
- Computing

## Proportion of time needed



## Tool Voting

### What it is

**A simple way to prioritise different options and display people's preferences, with lots of opportunity for creative adaptation.**

### How to use it

Use this when you or the people you are working with have already identified a range of options, for example at the end of a focus group.

### Examples

Give everyone a number of **sticky dots** to use to vote for different choices which can be displayed on a flipchart, represented by pictures etc. People can choose to stick all their dots on one picture, spread them across all the options – or on none at all.

**The roman emperor:** ask the group to give a quick 'thumbs up' or 'thumbs down' to say whether an idea lives or dies.

Alternatively, people can vote by holding up cards e.g. different colours for 'yes', 'no', 'not sure', or different numbers for how strongly they feel, e.g. from 1-5. (Tip – have someone to note the number of votes, or take photos to help you remember each response.)

**Smile please:** members of a group can also vote by making facial expressions, e.g. pulling a happy, sad or confused face.

**Tokens:** (Adapted from what you may see at supermarkets). Label different containers with the different options you want people to vote on. Give people tokens and they vote by putting the tokens in the option of their choice. Alternatively, you can display a question and ask people to use different coloured tokens for different responses.

### Advantages

- Allows everyone the same voice: a quiet person has the same say as someone who is more vocal
- Quick and visual way of seeing the results
- A good way to help people see the whole picture about the topic they are voting on

## Case Study

*We used a white board with a piece of string tied on, with a choice of three bags for children to put tokens in: a 'smiley' face, a 'not sure' face and a 'sad' face. Each child was asked if they liked coming to the club and placed a coloured milk bottle top in one of the bags to say how they felt.*

*This is something that we would use again, as it's simple and adaptable for lots of different questions.*

Cornerstone children's activity club

- You can give each person a different colour or shape of sticker to see if there are themes in what is important to different people or different sorts of people
- You do not necessarily have to have everyone together at the same time

### Limitations

- Need to make sure everyone has stickers – not pens to make a mark as then there can be cheating!
- People can be swayed by others' voting as they can see popular choices
- If using pictures as a guide, it can be hard to know exactly what people are voting for
- It is a good way of showing choices – but doesn't give people options to suggest other things

## Tool info

### Why do this

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

### Who for

- Adults
- Children
- Young people
- People with communication needs

### How many people

- 1-2 people
- Small group 3-15 people
- Large group 15+
- Large audience

### What's needed

- Facilitation skills/facilitator
- Special setting
- Computing

### Proportion of time needed





**Tool**

# Picture based consultation and 'Talking Mats'

**What it is**

A way of using visual images to consult with people, which can be particularly useful for people with communication needs.

**How to use it**

Ask individuals or groups questions and use pictures to represent the choices and/or the responses. For example, you could ask what they want to do on a short break, and have photos to illustrate different activities they can choose from. Or you can ask how they feel about a particular activity, and show them different facial expressions.

'Talking Mats' is a well-developed version of this idea, designed to help people overcome barriers to communication. It uses pictures to represent topics, options and a scale for rating them. Pictures can be placed on a physical mat, or viewed on a computer screen.

More information:  
[www.talkingmats.com](http://www.talkingmats.com)

**Advantages**

- Easy to understand and facilitate
- Can be adapted easily by changing the pictures
- Relatively cheap as pictures can be used again and again
- Allows people to tell you what they don't like

**Limitations**

- The right pictures need to be used to make sure the right information is collected
- There is potential for misunderstanding, as images can mean something different to different people. If possible, try to find out what the picture means to each person
- People must not feel like they are being patronised or they won't buy into the process

**Case Study**

We used Talking Mats to get feedback from the children and young people who attend the activity club. Some symbols are universally recognised (e.g. "thumbs up" to represent "yes") and the children use them regularly at school). Some children had no difficulty understanding the task and undertook it with ease, clearly able to show the activities they liked and did not like. Others had more difficulty with the task, and required more time to be spent.

Overall, the use of Talking Mats was successful, but it requires staff to understand the concept and be able to apply it effectively.

Cornerstone children's activity club

**Tool info****Why do this**

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

**Who for**

- Adults
- Children
- Young people
- People with communication needs

**How many people**

- 1-2 people
- Small group 3-15 people
- Large group 15+
- Large audience

**What's needed**

- Facilitation skills/facilitator
- Special setting
- Computing

**Proportion of time needed**

## Tool Telephone interviews



### What it is

**A way to get individual responses to consultation that allows more depth than a paper-based questionnaire.**

### How to use it

Think carefully about the questions you need to find out about so that the interview is focused. You may find it helpful to include carers or the people they care for in designing the questions.

As much as possible, arrange telephone interviews in advance and give people the questions to allow them to prepare.

Use your questions as a guide, but don't be too rigid. As well as creating a more natural conversation, this means you get the information you need while allowing people to go into more detail on the things that matter to them.

Finally, think about how you will record the conversation. Will you just make notes, or will you use a voice recorder? Either way, check you have the person's permission and that they understand what will happen to their information.

### Case Study

*We found that the telephone survey was the best technique and came out tops for us:*

*We didn't have to make separate arrangements for carers to come in and see us.*

*We could consult seamlessly when carers contacted us to book the service, and immediately after the last session.*

LifeCare (Edinburgh)

For the full story of this tool in use, see [Page 31](#)

### Advantages

- No form filling for the person being interviewed
- Good way to get in-depth information

### Limitations

- Time consuming to carry out, transcribe and analyse
- Not always easy to catch people at a good time
- Need to make sure people understand what the call is about and what will happen to the information

## Tool info

### Why do this

Generating ideas

Gathering information

Refining

Prioritise/decision

### Who for

Adults

Children

Young people

People with communication needs

### How many people

1-2 people

Small group 3-15 people

Large group 15+

Large audience

### What's needed

Facilitation skills/facilitator

Special setting

Computing

### Proportion of time needed



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## Tool

# Using physical space

## What it is

**A way to use available floor space to get information in a participatory way.**

## How to use it

Here are a few examples of how to use physical space in consultation. Be creative and come up with your own adaptations. Tip: have a camera or note-taker to help you remember where people stood.

## Run-a-round

Split the room (or space you are using) into different areas, for example one corner of the room is marked 'Yes', another is 'No'. Read out a series of questions and ask people to move to the area of the room that represents their answer.

## Human spectrum

Alternatively, you can ask people to place themselves somewhere on a scale or spectrum. For example, if one end of the room means 'Totally agree' and the other 'Totally disagree', where do they stand in relation to each question you ask?

## Human sculpture

This one is a bit more complicated, but it allows people to tell you what matters to them, in their own way. Ask people to use poses to make a 'sculpture' to represent how they feel about a particular issue. Give them plenty of time to discuss what they want to say and how to create the sculpture.

Once it has been created, you (or other audiences) can try to interpret the sculpture's meaning, and check if you have understood it correctly. This can be a powerful exercise at public events if people have had time to prepare their sculpture in advance.



## Advantages

- Strong visual representation of feelings
- Immediate, easy to count up right there and then
- Provides good photo opportunities (e.g. for the front cover of the consultation feedback report)
- Fun to participate in

## Limitations

- Needs plenty of space
- Might not work with people who are relatively frail or immobile

## Tool info

## Why do this

Generating ideas

Gathering information

Refining

Prioritise/decision

## Who for

Adults

Children

Young people

People with communication needs

## How many people

1-2 people

Small group 3-15 people

Large group 15+

Large audience

## What's needed

Facilitation skills/facilitator

Special setting

Computing

## Proportion of time needed

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## Tool

# Social media

### What it is

**A way to consult with people using social media, particularly effective for reaching and interacting with people you might not hear from otherwise.**

### How to use it

There are a variety of different types of social media, so here are examples of how different ones could be used.

**Discussion Forums:** If your website already has discussion forums, then you could post questions to be discussed.

**Facebook:** You could post a comment or question asking people to like or comment. You can also share links to a larger survey, i.e. survey monkey.

**Twitter:** You could create a hashtag (#) topic so people could quickly tweet opinions about the topic.

**YouTube:** You could create a video that informs people about the consultation, asks a question, etc. Or you could ask people to submit a video response to a question.

**Instagram / Snap Chat / Flickr:** You could ask people to send or post pictures that represent how they feel about something, or shows an activity they enjoy doing, etc. In this way the tools can potentially be suitable for people with communication needs.

### Advantages

- It can be free and convenient
- You have access to a wide audience and can bring people with a common interest together
- Any feedback you give can be made available to everybody and not just individuals/small groups
- It can be an engaging way to consult with people who regularly use social media, e.g. young people

### Limitations

- You might need to provide people with information about internet safety
- Depending on which type of social media you use, you may be limited to one question at a time
- Not everyone uses social media, so you may be excluding some people

## Case Study

Angus Carers Centre traditionally found it difficult to engage with some parent carers. By setting up a consultation discussion on Facebook, they got ideas about what parent carers were looking for in a short break. The discussion thread was seen by over 400 people! A lively discussion followed and people gave their views on the subject in an environment in which they felt comfortable, and at a time that suited them. Many parent carers also contacted the Centre directly to express their opinions, having seen the discussion on Facebook.

For the full story, see [Page 28](#)

## Tool info

### Why do this

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

### Who for

- Adults
- Children
- Young people
- People with communication needs

### How many people

- 1-2 people
- Small group 3-15 people
- Large group 15+
- Large audience

### What's needed

- Facilitation skills/facilitator
- Special setting
- Computing

### Proportion of time needed





## Tool

# Focus Groups

## What it is

**A small group of people coming together to focus on a particular issue, led by a facilitator.**

## How to use it

A focus group usually lasts 60-90 minutes and has 6-8 questions or topics to explore.

The idea is to generate good discussion, not to reach agreement. In fact, it is important to encourage a range of different views to be heard.

Focus groups need to take into account:

- **Planning:** Where will it take place? Will it be part of an existing group activity? Who will be invited? Will they be reimbursed? What is the incentive for them to come?

- **Facilitation:** Do you want to use an independent person, or someone the carers already know?
- **Recording:** Will someone sit in on the focus group and make notes, or will the facilitator use a recording device?
- **Write-up:** Will the discussions be written up then analysed for themes and patterns that emerge? (This is the most useful approach, but it's time consuming.)

Focus groups can help you explore information you have from another source more deeply. For example, questionnaires can be good for getting quantitative information, but focus groups can help you understand some of the 'hows' and 'whys' beneath the numbers.

## Case Study

*'We selected Focus Groups as they are effective for exploring key issues with individuals in more detail, within a group setting. In addition, they can provide useful insights to planners and providers of services to gain feedback in some depth about the quality and effectiveness of services.'*

*This form of consultation is effective in enabling individuals to speak from their own experience, learn from others and contribute ideas about how to improve the experience for carers.'*

Inverclyde CHCP

For the full story of this tool in use, see [Page 30](#)

## Advantages

- Allows in-depth exploration of issues
- Sometimes generates new ideas, as people spark off each other

## Limitations

- Takes time to prepare and analyse
- Careful facilitation is needed, to make sure everyone's voice is heard
- If people don't come, valuable time can be lost
- The views you hear might not be representative

## Tool info

## Why do this

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

## Who for

- Adults
- Children
- Young people
- People with communication needs

## How many people

- 1-2 people
- Small group 3-15 people
- Large group 15+
- Large audience

## What's needed

- Facilitation skills/facilitator
- Special setting
- Computing

## Proportion of time needed



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## Tool Questionnaires

### What it is

**A range of tools (usually paper) that gather information about key questions.**

### How to use it

We have all probably used questionnaires or completed ones. Response rates to questionnaires can be very low, however, so here are some tips for making it a success:

- Keep questionnaires as brief and focused as possible. Shorter questionnaires tend to get better return rates
- Make sure the layout of the page is attractive and looks easy to complete, with a decent size font. Research has shown that a bit of colour on the page also yields better response rates
- Try to balance open and closed questions. If you need quantitative information (e.g. how many people feel a certain way), closed questions (yes/no) and simple scales are best. If you want to understand 'how' and 'why' people feel a certain way, open questions are best
- Watch out for leading questions, e.g. 'Did the short break have any affect on your health?' is less leading than 'Did the short break improve your health?'
- Include a short description of why the questionnaire is important, but avoid implying how people should respond. For example, 'Help us secure funding for this service' may prompt people to reply in a certain way
- Return rates are always better if you have a captive audience, for instance at the end of a group session where you can encourage people to complete the form
- If you are using a postal questionnaires, then consider including postage-paid envelopes for the return. Return rates can be improved if you contact people in advance to let them know about the survey and remind people who have not returned it

### Case Study

*By linking in to a wider consultation with carers, the new Short Break Bureau in Midlothian generated useful insights into short breaks and what the service offers carers.*

*'The survey is a large undertaking – in terms of cost, staff time and carer time. However the results are incredibly helpful in shaping how Wee Break Midlothian will develop.'*

Wee Break

For the full story, see [Page 34](#)

### Advantages

- Questionnaires are a familiar, tried and tested method (but test yours out before using it to make sure it gives you the information you need.)
- Can be anonymous
- Don't need specialist equipment or knowledge

### Limitations

- Easy to ask the wrong questions or word them in ways that don't give you helpful information
- Low return rates, unless you help people fill them in (which removes anonymity and adds pressure.)
- Costly if sent by post
- Boring! People have questionnaire fatigue

## Tool info

### Why do this

Generating ideas

Gathering information

Refining

Prioritise/decision

### Who for

Adults

Children

Young people

People with communication needs

### How many people

1-2 people

Small group 3-15 people

Large group 15+

Large audience

### What's needed

Facilitation skills/facilitator

Special setting

Computing

### Proportion of time needed



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## Tool

# Online questionnaires and surveys

## What it is

**A way to design, send and analyse questionnaires, often free of charge, using online tools like Survey Monkey and Survey Builder.**

## How to use it

Go to the website of your chosen on-line survey creator, where you can see how to use the tools. They are usually straightforward, with example surveys you can browse.

Most of the tips we included under the questionnaire tool also apply to on-line surveys, but here are some additional tips:

- Ask someone to test the survey and hyperlinks before you issue it
- Data protection: if you email it directly to people, choose 'Bcc' so their email addresses aren't visible to other recipients
- Select the option that lets respondents return to their answers, in case they get interrupted midway through
- Signpost people through the survey so they know how much more of it they have to do

## Advantages

- Data is already input, ready for you to analyse and can usually be exported
- Can be quick and efficient to set up and analyse
- Can be anonymous

## Limitations

- Not everyone is online – who will you exclude if you only use electronic surveys?
- It is easy to ask the wrong questions or word them in ways that don't give you helpful information
- Boring! People are starting to have survey fatigue

## Case Study

*Through conversations with funded projects and information reported on evaluation forms, we were aware of some training needs and common good practice topics. In order to prioritise these topics, we created an on-line survey via Survey Monkey which we sent to all 114 funded projects. 58 people responded.*

*I particularly like how easy it is to download the responses to a spreadsheet. Given the nature of the survey, it was not anonymous, so I have also been able to contact respondents individually when I have wanted to find out more information.*

*Despite asking if there were other topics of interest, very few people came up with other ideas, which is probably an indication of the limits of this type of survey, rather than our knowledge of training needs.*

*Overall, we found the online survey a quick and inexpensive way to prioritise sharing good practice events, but would not rely on this method as the only way of consulting.*

Shared Care Scotland  
Learning Exchange

## Tool info

## Why do this

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

## Who for

- Adults
- Children
- Young people
- People with communication needs

## How many people

- 1-2 people
- Small group 3-15 people
- Large group 15+
- Large audience

## What's needed

- Facilitation skills/facilitator
- Special setting
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## Proportion of time needed



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**Tool**

# Inspiring Breaks: My Break Planner

**What it is**

A pictorial tool to help people reflect on the possibilities of a short break.

**How to use it**

Inspiring Breaks allows people to look at what they would like from short breaks, what they have enjoyed in the past and what hasn't worked for them. It focuses on strengths and can be used as little or as much as the service user likes.

It is not always possible or desirable to complete the full planner in one visit. Even a couple of pages can bring up a vast amount of helpful information about what kind of breaks the person would enjoy, what their family expect and how a break can be planned.

For more information, see

[www.sharedcarescotland.org.uk/resources/Short+Break+Planner+Index+2/My+Ideal+Break.html](http://www.sharedcarescotland.org.uk/resources/Short+Break+Planner+Index+2/My+Ideal+Break.html)

**Advantages**

- Adaptable, supports ideas to be developed in 1:1 conversation
- Provides in-depth qualitative information
- Inclusive, visual and creative
- Encourages ownership – important as part of Self-Directed Support

**Limitations**

- Needs time and skill to facilitate person centred meetings
- No quantitative data, making it more time-consuming to analyse and compare results

**Tool info****Why do this**

- Generating ideas
- Gathering information
- Refining
- Prioritise/decision

**Who for**

- Adults
- Children
- Young people
- People with communication needs

**How many people**

- 1-2 people
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- Large group 15+
- Large audience

**What's needed**

- Facilitation skills/facilitator
- Special setting
- Computing

**Proportion of time needed**

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# Case studies

This section contains case studies about how some of the tools were tested and used in real life short break settings.

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## Case study

# Angus Carers Centre

**Angus Carers Centre is an organisation which provides support to unpaid carers living in Angus. The Centre currently has around 1,800 adult carers registered, with 350 of those registered caring for a child under the age of 18. In practice, these parent carers have been particularly challenging to reach.**

Due to the increasing popularity of social media in communicating with stakeholders, Angus Carers Centre set up two Facebook pages for 2011 – one for Young Carers, and a more general page for the Centre as a whole.

In recognition of the fact that many of the parent carers registered with the Centre are users of Facebook and find this a convenient way to communicate, it was decided that when shaping a funding application for Short Breaks for Parent Carers via the Better Breaks Fund, a consultation using Facebook would be worth consideration.

**A post was placed on the Centre's page, hoping to provoke discussion around what parent carers were looking for in a short break. The resultant discussion thread was seen by 411 people!**

This may have included any of the subscribers to the page, as well as any of their friends who may have seen comments their friends had made which led them to navigate to the page to join in. A lively discussion followed and a large number of parent carers gave their views on the subject in an environment in which they felt comfortable, and at a time that suited them.

Many parent carers also contacted the Centre directly to express their opinions, having seen the discussion on Facebook, however wishing their comments to remain private.

Following the success of the social media consultation, it is likely that this method may be considered again in the future, particularly when trying to consult with those harder-to-reach groups who are less likely to attend consultation events, or spend time completing questionnaires. Indeed future consultations are currently being planned for young carers using the same method.

In planning any other consultation exercises for carers in the future, however it is likely that a “blend” of activities will be adopted in order to achieve the greatest response from those who are regular users of social media and those who prefer more traditional methods of engagement.



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## Case study

# Cornerstone's Children's Activity Club in Dundee

**In Dundee we support children and young people with significant needs in our local authority funded service.**



We consulted with the children and young people and their families to determine if they wanted a break and what kind of break that they would like. We didn't want to make assumptions on what we thought people needed.

The consultation began with written questionnaires aimed at the families and a pictorial version for the children and young people. Although this gave us some useful information, there was a low response rate.

In order to gain a deeper understanding of what the children wanted and how they and the carers benefitted from short breaks, I had to expand on how I consulted.

I attended the Activities club to observe the children and young people at play. This was beneficial as they were relaxed and engaging with each other whilst answering my questions, which promoted discussion within the group. I used photos and pictures of activities with the younger children to find out if they liked to attend the club and what they liked to do.

I also met with Parents and Carers when they collected their child, and rather than give them a questionnaire I asked if they would provide me with their story (case study). Parents/families could write this in their own time and did not have to attend an event such as a focus group which is sometimes difficult for them due to childcare issues. These were more powerful and provided a higher rate of engagement than questionnaires: parents really welcomed the chance to tell their stories. For example, one carer said:

*'I wanted to write to you...to let you know how much the club is benefiting (my daughter) and us as a family. We have seen a huge difference in her social skills. The club gives her a place where she can go play, have fun, interact with others and be herself.'*

**Taking part in developing the Consultation Toolkit has made me consider the variety of ways that we can consult with people and to try some of these methods out and to adapt these to use to consult with the children, young people and their families.**

**It has also made me realise that consultation is an ongoing process and it is best to gather information frequently from the children, young people and their families/carers so that you can adapt and make changes along the way.**

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## Case study

# Inverclyde CHCP

**Inverclyde CHCP is an integrated Community Health and Care Partnership. We are currently implementing a Dementia strategy, which has a key outcome of creating a dementia friendly community. Short Breaks play an integral part in the implementation of this strategy, enabling carers to continue in their caring roles, feel supported and be able to participate in their own community.**

To explore key issues, we recruited a focus group, by approaching other colleagues in the CHCP and voluntary sector to identify carers who would be willing to give their views. A total of seven people participated in the consultation. The meeting lasted approximately seventy five minutes which gave time for carers to introduce themselves, speak about their own experience and offer their views.

It was important for the carers to reflect and comment on their own personal experience to help them feel comfortable, before talking about the benefits of the experience and how this could be improved. However we had not been able to contact any of the individuals personally in advance and were not sure how well briefed they were. In future, the facilitator should be the one who makes contact with potential group members to ensure that they are properly briefed and know what is involved.

The focus group was effective in highlighting the key issues and importance of short breaks options, while demonstrating that there had been progress made towards personalisation and taking the needs of carers into account. Within the short space of time we had, carers were also offering mutual support to one another by advising about different supports and services available and how to access these.

To shape the development of the next three year Carers Strategy for Inverclyde it would be useful to meet this group of carers again. Some more focus groups can also explore specific issues in relation to the Strategy.

We selected Focus Groups as they are effective for exploring key issues with individuals in more detail, within a group setting. In addition, they can provide useful insights to planners and providers of services to gain feedback in some depth about the quality and effectiveness of services.

**This form of consultation is effective in terms of enabling individuals to speak from their own experience, learn from others and contribute ideas about how to improve the experience for carers.**

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## Case study

# LifeCare (Edinburgh) Ltd

**LifeCare is an Edinburgh-based charity that provides a range of care, support and community services to older people, people with dementia and carers. One of these services, Time Out for Carers Needs and Aspirations was a new project for LifeCare.**



To understand whether or not this was a valued intervention that made a difference to the lives of carers and those they care for, we captured baseline data with which to consult on and compare at a later date.

We opted for a telephone questionnaire.

This was done in two stages - in the form of a 'before the break' and 'after the break' telephone consultation.

Before the break consultations took place when the carer telephoned to book the service, capturing immediately the baseline data we sought. On completing the break, we followed up with a telephone consultation following the final scheduled session. We were then able to compare and contrast answers.

Feedback from individual carers was immediate and this was a reasonably efficient method to capture information. Collation and analysis is always a chore, but because individual carer (before and after) surveys were clipped together, it was relatively easy to compare individual results. As to the collation and analysis of carers' experiences as a group, that was trickier and more time consuming. We did reap excellent results though, which were reported back to Shared Care Scotland.

Halfway through the first year of the project we used the [Shared Care Scotland Evaluation Toolkit](#) to fine-tune our consultation questions. Of all the tools in the Toolkit we found that the telephone survey was the best technique and came out tops for us:

- We didn't have to make separate arrangements for carers to come in and see us
- We could consult seamlessly when carers contacted us to book the service, and immediately after the last session

In working with others on the Consultation Toolkit, we were reminded that, online consultation survey tools could help us to collate group consultation data more easily. We are going to try this out and see what we learn. It might be that this would be especially useful and much less time consuming for larger carer samples – and it can still be done when chatting with carers on the telephone.

## Case study

## No Limits

**No Limits are a West Lothian based multi-sports club for children and young people with disabilities. The club is run by a committee consisting of parent/carers volunteers and members who have a disability.**



The primary purpose of the consultation exercise was to enable the management committee to make informed decisions about the day-to-day management of the club as well as address strategic issues.

A mixed methodology involving a three pronged approach was adopted to allow everyone to take part, and get information on a range of issues.

### Method 1 (Personal Interview)

For members with learning disabilities or communication needs an 'Easy read' folder containing pictures of all the sporting and social activities the club provided was compiled. Using the smiling/unhappy face symbols, their views were recorded on a one to one basis. This method took account of verbal and non-verbal responses including positive and negative interpretations of body movements.

### Method 2 (Sticky Walls approach)

Members attending the Annual General Meeting were asked to name one thing they liked about the club and one thing they did not like about the club and to write the answers on sticky post it notes and place them on two relevant wall mounted posters.



### Method 3. (Roulette Type Table- Place your bets!)

At the Annual General Meeting, members were also given twenty poker/gambling type chips. They were presented with a series of topics and questions laid out in the format of a roulette table board. After some time to acquaint themselves with the topics, they placed their chips on the board as a way to have their say. At the end of the exercise the results were collated for later analysis.

The final results of the exercise provided clear directions for the future and answered important questions. They confirmed many things we suspected, but also helped us learn about our processes. The consultation provided the evidence base needed for future decision making and proved to be an enjoyable way of achieving that goal.

Our message to anyone doing a similar exercise is to encourage honesty and frankness and don't be afraid to try something different.

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## Case study

## Shared Care Scotland



**Shared Care Scotland administers the Short Breaks Fund on behalf of Scotland's National Carer Organisations (NCOs) and the Scottish Government. The Fund makes grants to third sector organisations to develop the choice and availability of short breaks so that carers and the people they care for feel better supported, less isolated, and have some quality time away from their routines.**

Following four successful rounds of the fund, we consulted with the NCOs and representatives from key stakeholders (including grant assessors, members of the Grants Advisory Panel, and funded organisations). The aim of the consultation was to help inform the decisions of the development of the Creative Breaks programme.

24 people attended the day, and we chose to use [World Café Conversations](#) to discuss four questions and used [Sticky Walls](#) to highlight the main points discussed.

We hired a facilitator, allowing our staff to concentrate on the discussions while the facilitator ensured the day ran smoothly. Participants sat around four separate tables, with a staff member hosting the discussion at each table. The role of the host was to ensure that the conversation kept flowing and that everyone had a chance to speak. We asked four different questions and allowed approximately 20 minutes per question.

Participants took responsibility for writing down important points from the conversation, and these were then put on the sticky wall for all to see.

We spent most of the preparation deciding on the questions. Originally we had about ten questions, but this had to be condensed to four: it is important to remember your audience when writing the questions.

Allowing 20 minutes for each conversation was tight and 30 minutes may have been better, although hosting was easier as the conversations never really lulled. We think the day was definitely enhanced by having a facilitator who was not hosting a table and could concentrate on keeping people to task, especially given the short times that each question was discussed. The facilitator also helped group things on the sticky wall and encouraged people to look at the wall during lunch.

Those responsible for making decisions about the Short Breaks Fund met following the consultation, and used the information gathered to shape the next round of Creative Breaks.

It was helpful to have this input in such an engaging way, and decisions regarding priorities seemed to flow from the discussions.

There was a good buzz in the room during the conversations, and the feedback was very positive about the event. Some people felt that they had learned from the day and got some new ideas to take back to their own organisation. There were also some very good suggestions that came from the day that we hope to take forward, in particular the idea of creating a book of short break examples to help carers create their own break.

**With good preparation and the right questions, World Café Conversations can be a really engaging way to consult. It has the added benefit that participants can network and learn from each other, so it does not feel like it is a one-way consultation.**



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## Case study

# Wee Break Midlothian

**Wee Break Midlothian is the new Short Break Bureau in Midlothian. It is part of VOCAL (Voice of Carers Across Lothian) and provides information, advice and emotional support, training and funding to help carers access the 'wee break' that is right for them.**

VOCAL undertakes a large scale survey every two years to provide carers with an opportunity to comment on their experience of VOCAL and on current issues affecting carers. In 2013 we sent a four page questionnaire to everyone on our database (5,498 carers), advertised it on our website and in newsletters and promoted it at training events and through carer networks. Carers were given a FREEPOST envelope and had seven weeks to return their questionnaire and could choose if they wanted to be entered into a prize draw (questionnaires could also be anonymous).

**714 responses were received making this the largest carer survey undertaken in Lothian to date.**

Quantitative data was analysed using SPSS (Statistical Package for Social Science). Qualitative data was coded according to a coding frame developed for each question.

External researchers designed the questionnaire, inputted data, analysed responses and wrote the final report. VOCAL have shared the findings widely – on our website, with partners and through press releases.

Although not specifically focused on short breaks, the scale and range of the questionnaire provides insights on not only the provision of short breaks but also on how and what we offer carers and provides a focus for future campaigns – e.g.:

- There was very strong feeling that short breaks should be free (the third most requested service) – and in particular access to leisure facilities. This will focus future discussions with the local council.
- The need for free short breaks was felt most strongly by younger carers, whilst older people mentioned the need for information and advice as being important. The survey also asked how people access information and how often they

would like to receive it. These two responses will affect the content and style of future resources.

- Opportunities to meet others in informal settings such as peer support groups and training courses were valued. This will inform the type of services offered.
- There was a need for more information on SDS – both in general and in relation to short breaks. This will shape future resources/courses provided.
- The importance of a friendly, welcoming and approachable attitude among VOCAL staff was highlighted. I would hope we can continue this!

The survey is a large undertaking – in terms of cost, staff time and carer time. However the results are incredibly helpful in shaping how Wee Break Midlothian will develop.

Read the full report here: [www.vocal.org.uk/carerssurvey2013.html](http://www.vocal.org.uk/carerssurvey2013.html)





## Case study

# Aberdeenshire Council

**Aberdeenshire Council uses a range of consultation tools to develop short break provision in Aberdeenshire.**

## Questionnaire

When Aberdeenshire Council launched the Short Breaks Bureau, they contacted the Citizens Panel to find out what people wanted from the new service. Citizen Panels are run by most Local Authorities and consist of people who are happy to be part of consultations.

The Citizens Panel was chosen as it reached a large audience, is representative of Aberdeenshire residents and has a good response rate (70%).

8 questions were formed and sent to the panel members; answers were collected and compiled by the Citizens Panel who then provided written summaries and statistic tables covering the information collected. This information was then used to shape the Bureau services and priorities.

As a starting point for the Short Breaks Bureau, quantitative data was seen as being important as it was more objective and could be used to prove/disprove hypothesis held by Short Breaks Bureau staff prior to the start of the consultation.

As a tool, this was useful for collecting information from a large audience in a short period of time, but the audience was not all our 'target audience' of people who would use the Short Breaks Bureau. Unless there was a large service development or review, we would prefer a more focused approach in the future.



## Focus Groups

Aberdeenshire Council wanted to support staff to plan innovative Short Breaks for older people. To find out what people needed, the Bureau published a questionnaire which relied mostly on closed (yes/no) questions.

Small groups of staff were gathered and asked about the feedback given in the questionnaire. They were able to expand on answers given and introduce new ideas and thoughts.

Thus, questions asked in the first focus group were different to those asked at the last; making the consultation as useful as possible and ensuring the consultation asked the most relevant questions.

This approach took a lot of time and resources due to the geographical layout of Aberdeenshire. However, this approach would be favoured in future due to its ability to produce debate around the consultation and allow people to add ideas as we went along.

## Survey Monkey – Questionnaire

Aberdeenshire Council uses local Care Homes to provide respite to people. To make sure that all the resources used were fit for purpose, Aberdeenshire Council launched a consultation. Due to the large numbers of Care Homes being consulted and the standardised types of questions to be asked, Survey Monkey was chosen as the best way of collecting information.

A survey was designed which would collect all the information we needed. Care Homes were invited to complete the survey and answers were saved on Survey Monkey itself.

Survey Monkey continues to be a favourite consultation tool. It is easy to use for both the survey creator and the person answering the survey and it compiles the information in easy to understand formats.

## Case study

# Break Away

**Break Away is a Self Directed Support project for individuals living in Edinburgh who have a disability and require short break respite. We co-ordinate work with individuals and carers to support the planning and brokerage of short breaks and social events. Using our service, families, carers and individuals being cared for can tailor their short breaks to suit individual needs.**

We organised a consultation day to gather feedback from families and individuals in order to evaluate the work we do and plan for 2014/2015. The day was split into 2 half day sessions; workshops for social events, short breaks and evaluation were arranged. Each workshop lasted half an hour.

There were over 100 people attending the day so we decided that dividing the guests into focus groups (between 5 and 8 people in each group) for the review workshop would be a manageable and effective way of gathering

feedback. Each focus group had a facilitator who asked a series of questions and topics, and a note taker. The questions included; does your Break Away worker listen to you? Do you feel that using the Break Away service has had a positive impact on your life? What would you like Break Away to work on for the future to improve your service?

Using focus groups gave people the opportunity to share experiences, give feedback and voice new ideas. It provided a good platform for carers and members to chat to one another and it was cost effective, however, lots of planning time is needed.

Guests were split into larger groups for the planning of the social programme and short breaks and we used a visual tool; members were given pictures of the events and breaks that they have previously enjoyed and asked if they would like to do them again. There were also blank stickers for people to write down new things that they would like to experience. They then stuck all the things they wanted to do on a year's planner.

After each group the facilitator took a photo of the planner. This was then passed on to a Break Away worker who planned and co-ordinated a Social Programme for the following year based on the events that were chosen by individuals.

This tool was effective as it allowed individuals with communication difficulties to take part and empowered members to have control and ownership of their Social Events.

At the end of the social events workshop, members were given a 'thumb' and were asked to give a thumbs up, thumbs down regarding whether or not they had enjoyed the social programme. This tool is good for gathering quantities of data; however, it lacks the depth of collecting individual and small group feedback.

After the workshops the groups gathered together for tea and cake in the Market place, where support providers had stalls to inform members, their families and carers of the support services that can be purchased through SDS. It was also

a chance for families to chat to the people that have been providing support to their loved ones.

On reflection, the workshops may have been too long. Some guests appeared a little tired and less eager to engage during their third workshop. We are currently planning this years' consultation day and are looking at different games that incorporate consultation as a means of gathering information.

Other support agencies were involved in the facilitation of the day. This was a good way to exercise co-production and provided the opportunity for support providers to gather their own feedback from members of Break Away who have used their services.

Overall, the day was very successful. The methods of consultation used provided Break Away with a chance to collect lots of quality feedback from face to face contact with families, and individuals were able to plan breaks and social events together.



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# Other sources of information, toolkits and standards

These are the sources we found particularly useful when creating this toolkit – not an exhaustive list, but plenty to get you started.



**The Big Plan** is a person-centred planning approach for working with young people in groups. It can be particularly useful for young people at transitional points in their life  
[www.edg-sco.org/community/resources/the-big-plan/](http://www.edg-sco.org/community/resources/the-big-plan/)



**Coalition of Carers: Carer Engagement Standards:** particularly useful for public sector services or partnerships planning to involve carers at a strategic level  
[lx.iriss.org.uk/content/equal-and-expert-3-best-practice-standards-carer-engagement](http://lx.iriss.org.uk/content/equal-and-expert-3-best-practice-standards-carer-engagement)



**Participation compass** a giant online library of resources and information on involving people  
[www.participationcompass.org](http://www.participationcompass.org)



**Scottish Community Development Centre** provide a range of tools, resources and standards for community consultation and engagement  
[www.scdc.org.uk](http://www.scdc.org.uk)



**Scottish Health Council** publish a Participation Toolkit for NHS staff, but it is a useful reference for others too  
[www.scottishhealthcouncil.org/patient-public-participation/participation-toolkit/the-participation-toolkit.aspx](http://www.scottishhealthcouncil.org/patient-public-participation/participation-toolkit/the-participation-toolkit.aspx)



**Shared Care Scotland** produced an evaluation toolkit in 2012 that is a companion to this Consultation toolkit  
[www.sharedcarescotland.org.uk/short-breaks-fund/Resources+for+Projects/Evaluation+Toolkit.html](http://www.sharedcarescotland.org.uk/short-breaks-fund/Resources+for+Projects/Evaluation+Toolkit.html)



**Talking Points** is a practical, comprehensive and well-recognised document on working with outcomes in the social care field  
[www.jitscotland.org.uk/action-areas/talking-points-user-and-carer-involvement/](http://www.jitscotland.org.uk/action-areas/talking-points-user-and-carer-involvement/)



**VOICE** is a free and easy-to-use tool for planning and reviewing any consultation. We strongly recommend that you plan your consultation before using any of the tools in this toolkit!  
[www.voicescotland.org.uk](http://www.voicescotland.org.uk)

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# Some challenges and reflections

**While we were writing the toolkit, we realised that there are common challenges that Short Break services might have when planning a consultation.**

This appendix lists some of the questions the authors had when they were doing their own consultations.

Because we don't want to be prescriptive, we have not given suggestions for how to answer the questions. Rather, we have phrased these as further questions to help you develop your own thinking.

## Question:

**How do you use everyday conversations as valid consultation?**

## Some thoughts:

- Can you keep a list of quotes?
- Would you go back to staff individually with the questions/requests that carers give you?
- Do you have a system for capturing enquiries/conversations? E.g. sticky notes on a whiteboard – themes emerging?
- How often do you meet the funders?
- Can you ask the commissioner, buyer or funder 'How do you like your evidence?', 'What would you be convinced by?'
- How do you record contact with carers? Can you trawl your database for recurring themes?
- Can you turn the informal queries into questions for a questionnaire, to see if other people feel this way?
- Can you make the links between what people ask for and what you provide?
- Can you speak to partner organisations about what issues are emerging for them?
- Can you keep knocking at the door/banging the drum, e.g. arrange a person centred planning meeting, speak to client and providers, then go to social worker with the results?
- How can you identify and build on helpful relationships/supporters?
- Could you create an 'intelligence' report, saying what you are observing? Managers can collate these observations, like comment cards.
- Can you make the case for what would happen without your support?
- How do you evaluate yourself?
- How representative are the suggestions you get? E.g. BBC and United States government use ratios to work out how many people each complaint represents.
- Do you have social media?



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**Question:**

How to engage more widely, including geographically and under-represented groups, for example men? How to make consultation more representative?

**Some thoughts:**

- Can you run themed events, with guest speakers e.g. info on welfare benefits, things that might attract carers?
- Can you change the language you use? Open meetings, not forums or consultations?
- Why do carers go? What's in it for them?
- And the cared-for person, what's in it for them? Could they come with the carer?
- How is the care being replaced when the carer is with you?
- Can you build on your successful events and groups?
- Are there opportunities to consult as part of your other services?
- Can you offer to go and see people at home?
- Can you run an open session – come and talk to us about whatever you want?
- If they don't come, does it mean they don't want to come?
- Would a 'Doodle' poll help you find out best times for people?
- How many of your carers are PC literate?
- How can you build on your social media use?
- Could groups/consultations be run by carers?
- Are there other characteristics men share, other than being just men? Other needs?
- How do you manage expectations, e.g. make it clear people don't just come to you for snooker?
- 'I need your help' – can you make clear requests of what you need from people?
- How important is it to get everyone together at the same time?
- Is it not enough to get a patchwork of different information in different ways/times?
- Do you need consultation? You might have a lot of information from phone calls, assessments etc.?
- Why are some groups 'hard to reach'? How do you overcome that? Who do you define as hard to reach?
- Why are you trying to reach 'hard to reach' groups – are they well served? Are they happy?



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**Question:**

**How to consult when people are on their way in and out of the building? How to get creative? How to consult by going out to people?**

**Some thoughts:**

- Can you follow-up from your attendance lists, e.g. we know you were here, can you give us feedback?
- A board with Velcro and pictures of places people might want to go – a way to plan the year ahead?
- If you give people a pen and paper while they are waiting for their children, would that help?
- How can you get people used to being consulted?
- Telephone consultation?
- Can you ask the same questions regardless of the method (e.g. phone, home visit) to give you comparable data?
- Can you get consultation information as part of booking/arranging short breaks?

**Question:**

**How can we reach people in better ways? How can we connect with other services?**

**Some thoughts:**

- Compare ideas with other organisations?
- Contact Community Voluntary Services (now mostly known as 'Third Sector Interfaces')?
- Go to meetings of third sector forums?
- Use 'LinkedIn' networks?
- Online directories?
- Can we find out what others are doing to reach people?
- Are we the best people to carry out the consultation? Can we subcontract it? Or ask other organisations to carry out a consultation we design?
- Can the toolkit signpost people to services that carry out consultation on behalf of others?
- Is the broker best placed to carry out consultation, or the people delivering the service?
- Can we link to tourism, e.g. attend tourism conferences?



Unit 2, Dunfermline Business Centre,  
Izatt Avenue, Dunfermline, Fife KY11 3BZ

Tel: 01383 622462

Email: [office@sharedcarescotland.com](mailto:office@sharedcarescotland.com)

Web: [www.sharedcarescotland.org.uk](http://www.sharedcarescotland.org.uk)

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