

Involving service users in recruitment

A peer-led research project by the Fulfilling Lives (multiple needs) National Expert Citizens Group

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CONTENTS

Acknowledgements	1
01. Introduction	2
02. Methodology	4
03. Key findings	7
04. Recommendations	27
Appendix A – Service user interview guide	34
Appendix B – Staff interview guide	37
Appendix C –guide top semi-structured interviews	40
Appendix D – NOtes from first training and planning session	42

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01. INTRODUCTION

This section explains the background to the research and details the content of the report.

This report is prepared for the Big Lottery Fund (the Fund) and the 12 projects funded through the initiative *Fulfilling Lives: Supporting people with multiple needs* [(hereafter referred to as Fulfilling Lives (multiple needs))]. It is also intended for wider dissemination to influence policy and practice for involving service users when recruiting posts working with people with multiple and complex needs.

Project background

CFE Research is leading the national evaluation of Fulfilling Lives (multiple needs). As part of the national evaluation we are committed to supporting a service user led or peer research' project every year. This is the first of six projects which will be completed between 2015 and 2021.

After CFE Research was commissioned to undertake the national evaluation, the Big Lottery Fund subsequently established a National Expert Citizens Group (NECG) for the Fulfilling Lives (multiple needs) initiative. Each of the 12 funded projects is represented by two members on the group, usually a current service user and someone involved in supporting service user engagement at the project level. Rather than setting up a completely independent group of peer researchers, it was agreed that a sub-group of volunteers from the NECG would conduct the first national peer research project.

For the national peer research project to be truly service user *led* and not just service user *involved* it is important that the peer researchers have autonomy over all aspects of the process. All aspects of the research are decided by the group: research question, approach, methods, outputs, individual roles and responsibilities. CFE Research provides training and support as appropriate for the group to complete their project. In order for the group to operate in this way some flexibility is required on the part of the national evaluation team and the funder (Big Lottery Fund). For example, it is not possible to provide clear and specific detail on the nature and timing of project deliverables. The continued support of the Fund to support activity within this broad framework has made the work possible.

This report

This report sets out the context in which the peer research project has been completed, provides details of our main findings and makes some recommendations for future involvement of service users in the recruitment of staff and volunteers.

For the purposes of this report we use the term ‘service users’ to refer to those currently seeking or accessing support from services provided through the 12 funded projects. In some cases this may refer to historical service use. We acknowledge the debate around the appropriate use of language to describe the different roles which people take in society and, in particular, in relation to this initiative Fulfilling Lives (multiple needs). Overall, ‘service users’ was the term most commonly used and recognised across all projects, interviewees and interviewers. For this reason we use the term ‘service users’ though we recognise that there are good arguments for alternative terms such as ‘expert citizens’, ‘experts by experience’, ‘beneficiaries’ and ‘lived experience’.

After this introduction the report is structured as follows: **Section 2** describes the methodology and timings of key activities for this research; **Section 3** provides a summary of the main findings of our research; **Section 4** provides recommendations for future practice and policy. The research instruments used in this project are provided in the Appendix.

02. METHODOLOGY

This section outlines the how the research was carried out and who was involved in it.

The topic for this piece of research emerged through informal discussions between members of the NECG at one of the quarterly meetings of the group. Those discussions centred on the extent to which those with lived experience of multiple and complex needs had been involved in the recruitment of staff across the 12 funded projects. This seemed an important area for further investigation and one which would particularly benefit from being led by service users. This was proposed to the full NECG at the next meeting and endorsed by the group with nine members volunteering to take on the role of peer researchers. A training and planning day was arranged to start the project and five volunteers attended the session and led the research project.

Training and support

The first training and planning session took place on 30th September 2014. The session started with a short exercise practicing interviewing each other. This was followed by a discussion about the broad topic and what we wanted to find out through the research. Through this process we developed the following research question:

— **To what extent have people with lived experience been involved in all aspects of the recruitment process for the 12 projects funded by Big Lottery Fund?**

Having established our research question we undertook a group exercise exploring the advantages and disadvantages of different methodologies. Following this we selected methods which we thought would be most appropriate for our research, namely semi-structured interviews with project staff and focus groups with service users. We agreed that the 12 funded areas would be divided up amongst the 5 peer researchers with no one conducting research with their own project. Notes from this session are provided as Appendix D.

Following the training and planning session each peer researcher reported back to service users groups at their project and brainstormed ideas for questions and activities to include in the interviews and focus groups. These were collated and a draft interview guide was developed for the semi-structured interviews with staff. At the next meeting of the NECG (Newcastle, November 2014) some of the focus group activities were piloted with service users. Through piloting these activities it was identified that this was not the best approach to take as there were not sufficient numbers of service users at each project who had participated in the recruitment process. At a meeting to finalise the approach (Nottingham,

December 2014) it was decided that semi-structured interviews with service users would be a better approach and that these could reflect similar questions to the topic guide developed for interviews with project staff. Interview topic guides are provided as Appendices A and B.

Each peer researcher arranged interviews at the projects they had been allocated. The local service user coordinator (or equivalent) facilitated the process of arranging interviews. New voice recorders were purchased and sent to each peer researcher. Professional researchers offer to accompany peer researchers on their first fieldwork visit but no one took up this option. Some additional support was provided via email and phone calls during the fieldwork period. In a small number of instances interviews were not completed successfully and for those projects/individuals were followed up with the opportunity to respond to questions via email. Although there were initially some difficulties in transferring files audio files were collated for all successfully completed interviews.

Analysis

After interviews had been completed a full transcript was produced from audio recordings. An analysis session was held at CFE Research offices on 28th April 2015 which was attended by all but one of the peer researchers. At the analysis session a facilitated discussion was conducted with peer researchers. This allowed peer researchers to feed back on their experiences of undertaking the interviews and to describe their findings in relation to two key areas:

1. Their overall impressions of the extent to which they believe service users have been meaningfully involved in the process of recruiting new staff for the 12 funded projects.
2. How they have found the process of conducting research? Were the methods chosen appropriate and did they feel able to undertake the activities required. What worked well and what could be improved in the process.

At the analysis session typed transcripts of the interviews were shared with peer researchers to assist in the process of reflecting on their overall perceptions in relation to the research questions. Peer researchers took the transcripts with them and were asked to read through them and highlight what they thought the most important points were and to identify direct quotes which illustrate these points. A discussion was had around looking for points which went against our own opinions as well as those which reinforced them.

Only one of the peer researchers completed the analysis and returned annotated notes with the transcripts for their interviews. The rest of the analysis and the report writing was completed by CFE Research staff. This was the most challenging area of the peer research process and is the main area we will seek to improve on for the next peer research project.

The peer research report was written by CFE Research and then circulated to each peer researcher in draft format. Each peer researcher was phoned individually to discuss their comments and any feedback/suggestions on the report. Some amendments were made to the report before it was finalised. Based on the final report a concise ‘Good Practice Guide’ was written for involving service user when recruiting new staff. Again, this was agreed by all peer research through a similar process to that describe above for the final research report.

Timescale

Figure 1 shows the overall time-line for the project. It is envisaged that subsequent projects will follow a similar overall timescale depending on the topic and approach taken.



Figure 1 – Summary of time-line for the first national, peer-led research project

03. KEY FINDINGS

This section provides a summary of the findings of our research supported by quotes from depth interviews with project staff and beneficiaries.

Semi-structured interviews were conducted by peer researchers with professional staff and with service users who had been involved in the recruitment process.

Strategic commitment for service user involvement in recruitment

One of the key underlying principles of the initiative was to put those with lived experience of multiple needs at the heart of service delivery and evaluation. This was evident across all funded projects. All 12 projects working on the Fulfilling Lives (multiple needs) initiative involved service users in the recruitment process to some extent. All peer researchers reported that professional staff and service users believed there was a genuine desire to see service users taking an active role in the recruitment process.

I think that the service user involvement, it hasn't just been a tick box, it's been a proper involvement and influence in the development of the project.

Staff interview

...the other people who sat on the interview panel went through it all with me and went through the questions with me before we started. They didn't make me feel like I was only a service user or anything like that. They treated me with respect and listened to what I had to say.

Service user interview

Peer researchers conducted interviews with both professional staff and service users who had been involved in the recruitment of staff at the 12 funded projects. There was strong strategic support across partnerships for this process. No areas declined to participate in the research and professional staff and those who lived experience of accessing services were committed to taking part in the interviews for the peer research project.

The only [comment] is that I think this process [national peer led research] is really good, because it's holding the programmes and projects to account, really. This is what the programme is about, so I think it's a good thing to do, really.

Staff interview

Interestingly, when asked for any additional thoughts at the end of interviews, several

service users expressed thanks for being interviewed and asked questions about their experiences and perceptions.

Partnership working

Each of the 12 funded projects for Fulfilling Lives (multiple needs) is a partnership of organisations led by one voluntary and community service (VCS) organisation. The recruitment of staff to the projects therefore takes place across numerous organisations with pre-existing systems and approaches to staff recruitment. In several cases all of the direct delivery is outsourced through external partners with the lead organisation providing infrastructure support and leadership of the programme. As a result, the lead organisation was not necessarily directly involved in staff recruitment but could still influence this.

So the user involvement from the [lead partner] point of view in the recruitment and selection of staff, was to make sure that the service specifications that went through the tender process to secure the delivery partners, framed what the service users wanted to see in terms of support worker staff values, behaviours, what their empathy was and how they would work. So, we made sure that that was built into the service specifications for each of the delivery partners, but it was the delivery partners that did the recruitment of the project staff and I had no direct involvement in that.

Staff interview

One project highlighted that one of the learning points from the recruitment process so far was that they would now make the involvement of service users a requirement of any contract for service delivery.

In terms of recruitment of project staff what I would do differently is within the specification I would have put something specific in the service specification that required the delivery partners or whoever won that contract to include service users in the job design and the job development and the recruitment and selection procedures.

Staff interview

With a partnership of different organisations delivering different elements of the programme the extent to which service users were involved in recruitment varied within projects from 'fairly extensive' to 'a bit patchy'.

...the recruitment of the project staff, I think the extent to which service users were involved I think varied between partners. I think in Whitechapel it was fairly extensive. I think in Riverside it was probably patchy and I think in the YMCA, that was probably the lowest area of service user involvement. I only found that out after the event.

I also know that in Riverside, they wanted service user involvement in the development of the job role and the development of the design of the jobs and I know YMCA didn't have anybody directly involved in their interview panels from a service user point of view.

Staff interview

Employing service users

Through the interviews researchers sought to gain an understanding of the number and proportion of current employees, funded through Fulfilling Lives (multiple needs) who had lived experience of relevant issues and had previously accessed services.

All of the funded projects had employed people with lived experience of accessing relevant services for multiple needs, however it was rarely known exactly how many or what proportion of current staff were former service users.

...overall you're looking at a rough figure of around 40-45 people employed in the project overall. I know that some of those are people with lived experience but I couldn't give you an exact number, you'd have to get that from the delivery partners.

Staff interview

Being honest, there is quite an eclectic mixture of people who are in recovery who are members of staff

Staff interview

This is really approximate because the more that I've got into working the more that I know that there's only a certain amount of people who will share that [they have experience of some of the main issues]. There's some people who have got lived experience, obviously, so I'd say there is a couple of people like that. So, from the experts group and from people who were involved in designing the programme, there is three people who I know have got lived experience. Through getting to know other people, I'd say there's about six more, to my knowledge. So approximately nine.

Service user interview

Where projects were able to estimate the proportion of employees who were service users this was around the 20% mark – so around a fifth of employees had lived experience of the issues of multiple needs and accessing relevant support services. However, this was not routinely or systematically recorded.

There's definitely three that were in our experts group who got on the programme. Then since then, [name] become a trainee, so we've got four. We do have members of staff who've got lived experience who didn't come through that experts group, but do have experience themselves. So four came through the experts group. I mean, because not everybody would be scored... five and six of that. So what's that? 20%.

Staff interview

The different models/approaches to recruitment are also considered to be an important factor in recruiting former service users as staff.

They recruit on a behavioural model so it's not a competency model. A result of that, for example within the accommodation based service, one of the support workers there is an ex-service user and three years ago was a resident in the hostel and is now a support worker at the hostel. I think similarly in... the intensive support service there are a number of members of staff who were recruited who are former service users. Former homeless people.

Staff interview

It may be useful for projects to keep track of this information, particularly in relation to informing how the different principles set out by the Fund are being implemented – e.g. involving service users – and whether/how and systems change is taking place. Many projects expressed a desire and expectation that the proportion of former service users employed by the project will increase over time:

So, we're expecting, or I'm expecting to see a quite considerable about of shift in the way that the service delivery partners operate [in terms of employing service users] throughout the life of the programme.

Staff interview

It is recognised that keeping account of whether staff have prior experience as service users is not straightforward and there are ethical considerations to take into account as well as practical challenges. For example,

some people may not disclose that they are people with lived experience as part of the recruitment process but it may be something that comes to light once they start work in the programme and they settle in and become part of the team.

Staff interview

I would think there's a minimum of six people...who've been directly employed because of their lived experience, but there would be other people who, perhaps, their lived experience is a bit more historical, who are also employed by the programme.

Staff interview

Also, a couple of staff interviewed highlighted that some staff members had 'second hand' lived experience which was also beneficial for working on the Fulfilling Lives (multiple needs) initiative.

Then there's other members of the team that I know actually have been through...it's not that they've got experience themselves but have, you know, brothers, sisters, sons, daughters who've been through the process of drug addiction, mental ill-health. So there's people with lived experience, I guess, second hand. You have the experience don't you, if you're a mum and your son's gone through all of that?

Staff interview

Some interviews explored whether projects had set quotas for the number or proportion of staff having lived experiences of the main areas of need. Again, this was not clearly defined across partnerships.

It was discussed, obviously, that ex-service users would take x amount of these roles.

Service user interview

For some specific roles some lived experience of the issues was stated as a requirement of the role. This was usually for voluntary roles providing direct support to beneficiaries of the programme. One service user interviewed stated that:

Yes, the peer mentors. It's targeted at being advertised to people who have experience of multiple or complex needs, or working through or with one of our services.

Staff interview

For these roles, additional activity had been undertaken to encourage service users to apply for roles. This included providing support with practical issues such as funds for buying work wear and to cover travel costs, plus restructuring salary payments from monthly to fortnightly for the first three months to facilitate the transition from benefits. Further,

[We have] also arranged some drop in sessions for people that would like to come and talk to us about the role and what it involves, building up to the closing date of the application, which we'll all be involved in. [We also provided] contact details and in the last sort of 48 hours since the advert's gone out the phone hasn't really stopped ringing for people wanting more information on the role and what it entails.

Staff interview

Another way of proactively encouraging service users to apply for jobs was to give equal weighting to experience and qualifications.

We made it quite clear that you didn't have to have the qualifications if you had the life experience.

Staff interview

Stages of the recruitment process

For many projects service user involvement in recruitment took place across all four stages and there was a shared understanding and commitment for this across both professional staff and service users.

Service users were consulted firstly on the roles in the programme and they were given copies of job descriptions and personal specs, so they had an idea as to what people would be doing in the programme. They were involved in the short-listing. I think they were consulted as well, over how the posts would be advertised. We had to meet the Big Lottery conditions for that as well, but they had a strong idea as to not only the designs for the roles, but the type of person they wanted in those roles. I think they also contributed to the questions and were represented on the panel as well. I think it was at every stage and for, actually, all the roles. For all the roles there was a service user representative on the panel. That, I think, varied as well, so it wasn't just one person, a few people took that role as well.

Staff interview

Interviewees also stressed the importance of service users having the necessary support in place so that they can make a meaningful rather than tokenistic contribution to the process.

It's vital to make sure that service users, if they are going to be involved in any sort of process, have plenty of time put into making sure that they're prepared and trained, so that they feel confident and empowered about expressing their views. In terms of systems change, it would be about making sure that you prepare, involve, and then follow through on that, rather than just the involvement bit

Staff interview

The extent to which service users were involved in the recruitment process varied across the 12 funded projects. To explore this in more detail the peer researchers broke the recruitment process down into stages and asked questions about each stage.

Stage 1 – Job Descriptions and Person Specifications; advertising and promoting opportunities

Across all 12 areas there was relatively less meaningful involvement of service users in the initial stage of defining roles through the production of job descriptions and person specifications,

We had to recruit as, kind of, one organisation, So we used [external/independent recruitment support] to put the jobs out. They [service users] weren't involved in any of the developing the job descriptions or anything.

Staff interview

Where service users were involved the extent to which they could influence change was fairly limited in terms of developing Job Descriptions/Person Specifications.

Yes, any advertising, any brochures, we were given the opportunity to see any of the work that was going to be put out, and agree on it. I actually designed the logo for it.

Service user interview

So there was a meeting, me and another expert by experience sat on that from our expert group. Within that group we started writing the job descriptions. I wouldn't say that we wrote them from scratch. I'd say that they were there and we agreed them, more than wrote them scratch. So that was the job descriptions, person spec and all of that. We, kind of, okayed it I would say.

Service user interview

Service users also contributed to advertising and promoting opportunities through their own social networks.

This may be influenced by the fact that the projects are all new services and in many cases did not have existing clients on their books at the point where they were looking to recruit

new staff. This may have made it more difficult for service users from previous/existing related services (e.g. other homeless charities) to get meaningfully engaged in this early phase of the process. There were also relatively few examples of projects involving service users in advertising and promoting the opportunities available.

In terms of learning, I think maybe there could be more input in the design of the roles. Maybe as we've gone live and worked with people for a few months, that may be something that we can in future.

Staff interview

Some projects did involve service users meaningfully in the design of certain roles and there were specific examples given of how service users had effected change.

Well the job role for the peer mentors, they had actually put it as a one-year contract and I said, 'Hang on, no,' because this project, it gets reviewed every year but it also gets reviewed every two years with the lead-worker role with having peer mentors, so it should be a two-year contract. They changed that straight away before they put that out to application, to two years rather than one year. So we are getting listened to. Quite chuffed with that because nobody wants to be getting a peer mentoring role for 12 months, then boom they've got nothing.

Service user interview

I do remember a part where we were talking about the specification and part of it was saying that you had to have your Level Three [NVQ]. Me and some of the other experts said, 'That isn't really fair, because we think you should also be able to have lived experience.' So they did change that so that it now says you've got to have a Level Three or have been volunteering or lived experience. You know, they put it in a way that encapsulates everybody, which I thought was really good. You know, because some people don't have access to certain qualifications...

Service user interview

This initial stage may be something which projects are better placed to do in the future as projects become more established and have existing service users who are supported to take an active role in service delivery.

Stage 2 – Short-listing

It was less clear from the interviews to what extent service users had been meaningfully involved in the short-listing process, though this appeared to be an area where service users were less involved on the whole. This is an important area of the recruitment process and the first point at which potential candidates may be filtered out of the process. Service

users felt strongly that this was an aspect of the recruitment process in which they should be involved.

In terms of short-listing, at this point they [service users] weren't involved in relation to the lead worker roles, but I believe they were in the short-listing process for other roles.

Staff interview

Stage 3 – Interviewing

Well I've sat on a few interview panels now, from the beginning really, when we were looking for team leaders, navigators. I've sat on a few of the interview panels.

Obviously, there was quite a big involvement there, deciding who was going to get the jobs and who wasn't.

Service user interview

The interviewing stage of the recruitment process is the stage which most interviewees in the research first think of when considering service user involvement. All projects had some involvement from service users at this stage of the recruitment process. The level of involvement varied across projects and for different roles being recruited. In the vast majority of cases a service user representative was included as part of a larger interview panel, alongside professional members of staff, and asked an equal share of questions.

We developed questions based on the person specification and then discussed those questions with the service user and refined them in the light of comments that he made about the questions. There were four people on the interview panel and he asked a quarter of them [the questions]; there were 12 questions and he asked three of them. He also had a chance to ask questions as well.

Staff interview

What we did, if there was a service user rep on the panel, we would ask them to bring a few questions. For example, say we had nine questions, there'd be three about the project, there'd be three about the role and there'd be three about service user involvement. We would ask the service user to bring ideas about questions and then we developed like a bank of questions that would be drawn on.

Staff interview

Where service users had been involved in interviewing they reported different experiences and perceptions of the extent to which this involvement was as full and meaningful as it could be. For example, whether service users were given or assigned certain questions to ask or whether they developed their own questions to use in the interview. This varied within projects as well as across different areas.

Q: Did you prepare your own questions?

A: No, the questions were prepared. There're ten questions we ask at an interview. There're four of us that sit on an interview panel, so you ask X amount of questions each.

Service user interview

There were a few examples where a separate service user panel was set up for some interviews, with a separate panel of professional staff. Both panels interviewed and scored people separately and then came to a consensus over their preferred candidate. This was viewed as being a successful approach.

For the panels that were service users, a separate panel, they asked all the questions, they designed all the questions themselves, looking at the specific role, looking at what attitudes they wanted to draw out, that sort of thing. That worked really well and we had a really good question that we used that one of the ex-service users came up with about stigma and it really, it was a really powerful question because people either answered it or they had no idea. It really helped us to get to the right type of attitude/person for the specialist role.

Staff interview

A couple of areas planned to use a separate service user panel in the future. In one case this was not possible due to the scale of recruitment and time-scales in one case, whilst in another it was thought it would improve the quality of potential candidates.

We found in the last couple of recruitment processes that we weren't really getting the value out of some of the people who were attending the interviews. So now the [service users] are working alongside the management team to get more experts more involved in the interviews and also having separate interviews so in future we would interview the applicants separately; [service users] on their own. Taking that scoring to the next panel interview with the management which are [service user] will sit on that process as well.

Service user interview

Not all service users reported having a positive experience of the process and one person stressed the importance of service users influencing the style and tone of all questions in the interview not just the ones that they will ask.

There was the set of questions in the HR resources format that I found very wooden and very grey. It seemed to me like the interviewers were waiting for the buzzwords. Methuselah's cycle of change, for example, do they know about that? I certainly don't want to know about Methuselah's cycle of change, but this is the structure. We're missing what the person's like. We're missing the person's skills and attributes, because we can all rehearse a script. I think that was what was fundamentally wrong with the process.

Service user interview

During the analysis session peer researchers discussed the extent to which it was preferable for a service user panel to interview separately from the staff panel or whether it was better for service users to be integrated with professional staff as part of one process.

What I would say is, having one person on the panel is not as good, a separate panel is the way because otherwise, unless they're really confident and really hold their ground and go, 'No, no, no,' they will be outnumbered and they won't have the opportunity to speak and be really open and honest

Staff interview

The model of integrating service users in one panel was more prevalent across Fulfilling Lives (multiple needs) projects. Overall it was felt that both models could be successful and the key was for service users to have an independent voice and carry equal weight to that of other individuals involved in the process.

Stage 4 – Decision Making

Where service users were involved in interviewing they also contributed to the decision making process. Again, the extent to which this took place varied as did perceptions around whether the voice of the service user carried equal weight to that of professional staff. One peer researcher felt that service users felt obliged to agree with the rest of the panel, through perceived greater knowledge, experience or power of professional staff. Another interviewee stressed the importance of facilitating service user to not just participate in the process but to make a meaningful contribution to it:

...trying to make sure that there's enough people in the interviews so that it is actually service user involvement, and them giving their opinions and not just being sat there.

Service user interview

Most projects could describe service user involvement across each stage of the recruitment process culminating and all felt that service users had a say in the decision making process to some degree. Usually there was some formally way of scoring interviews which supported the decision making process and service users were included in this.

During the interview process we all kept notes, including the service user we had on the panel, and... we all scored the candidate against the person specification, and that was done not separately by each person scoring, but by the whole group of four saying, 'Well, what do we think?' and discussing that between us. Again, he had a full input into that discussion and made these comments, and we all collectively agreed the various scoring. Then at the end, we reviewed the scoring along with our thoughts about the candidates and agreed, again, between us which candidate we thought we should offer the post to.

Staff interview

Some service users interviewed were able to give practical examples of discussions during the recruitment process which demonstrated that their opinion was valued in the same way as that of professional staff.

Yes, I feel like I really was [involved in the decision making process]. There was a couple of times when there were disagreements and I just stood my corner saying, you know, 'I really think that-', 'it wasn't like my say rules, it was like, to give an example, I thought somebody was really good because they were somebody that I could tell that I'd warm to, I'd open up to. I was saying, 'There's something about this person.' They were saying, 'Well we're a bit more worried about the work side of it and, you know, the management side.' We did at the end of it come to a decision and that person did get the job. So I really did feel like, you know, what I said did help make the final decision.

Service user interview

In one project there was an example where the service user voice had been overridden by the panel of professional staff when making the final decision of who to recruit into a post. The successful candidate subsequently resigned after just six weeks and as they were unable to connect with service users.

The service user panel were like, 'We can't connect with this person, we're really struggling.' We had a massive debate, it ended up that someone was brought back for a second interview and it was really difficult. In the end, the service user panel said, 'Okay, we'll go with the competency panel because you've justified to us how this person meets all those criteria and they can do the job.' Six weeks later, the person resigns, they can't do it, they're freaked out and they can't connect with clients. That to me says that we should have listened to the service user panel. Yes, that's been a lesson for me now, we've had to recruit again because we didn't listen to the service user.

Staff interview

This is a good example of the importance of valuing the service user voice in decision making. It also emphasises the importance of some of the 'softer skills' required for

working with people with complex needs, such as being able to connect with people on a personal level.

Selecting service users for involvement in recruitment

In arranging the interviews it became apparent that across many projects the same individuals were put forward as service users for these interviews. Indeed, in one case one of the peer researchers was themselves interviewed by another peer researcher as they were the only service users who had been involved in the recruitment process. Peer researchers felt that generally a small number of service users – ‘familiar faces’ – at each project get put forward to represent service users across a broad range of different activities. A small number of service users may therefore have a disproportionately large influence when representing the voice of service users.

It was a bit of a bugbear; honestly I think I did about twenty-odd of the interviews at one point. The words started going into each other a bit, you know, when I'd been sat there for three days. That was, like, not enough people [service users] trained [to do interviews].

Service user interview

I'm conscious that we only got influential involvement from one person, and although that worked fine, and I'm sure the person we put was fairly representative of our service users, that ideally you would want broader scope of influence.

Staff interview

One service user interviewed said that they were involved in ‘most of the interviews’ and this was problematic when they wanted to apply for a role or because, over time, they had already built up a relationship/rapport with candidates for the job:

In some of the other interviews, it did get a bit tricky. For example, I went for a job and I can't sit on my own one. There was some other ones where I would have really known the person well, so I didn't feel comfortable with sitting on it. With that they did get outside experts who hadn't been involved in [the project] but they were people with experience

Service user interview

There were examples of a wider range of service users getting involved in recruitment though, with one area selecting people to take part in the interview process through random selection.

Yes, we did the interview panels. We put the names in a hat and brought them out... The interview panels, we did it in the hat, who was going to go and sit on the interview panels. [The service user coordinator] always brought it to the table and we decided who was going and things like that.

Service user interview

Another issue discussed was the extent to which service users represented the different four needs which are the focus of this project (homelessness, substance misuse, reoffending and mental ill health).

On reflection the experts that we're using are not experts of the [Fulfilling Lives project], and they won't be for some time until people have moved along on their journey. So they may have been experts from a drug and alcohol point of view, or from drug alcohol criminal justice, but they may never have been homeless. They may not have had mental health issues. Although quite often, all of them, you know, go together. I think we've done the best we can, and we do value our experts.

Staff interview

...we could have shared the person specification, the job description, possibly even the questions with a wider group of service users, to get a bit more varied input into that. Maybe with people who had different experiences, people with experiences of drugs or alcohol, or of offending or mental health, and got more of a cross-section of things.

Staff interview

To some extent, the timing of the recruitment processes carried out at these 12 newly funded projects may restrict the extent to which service users could be involved. The funding was not provided to continue or up-scale previous projects but to establish a completely new service which, as well as improving outcomes for people with multiple needs, would also bring about change to the existing system. As such, many of the projects were recruiting staff for a new service which was yet to engage with any clients/beneficiaries. Thus there may not have been a [particularly large pool of service users from which to draw on and they may have reverted to engaging with service users from associated areas of service delivery over which they had less control/influence. This should not be an issue for any future recruitment processes for the initiative.

...their involvement is key [service users]. I think what's really nice about our service is we can shape a lot of it around the viewpoints of the experts by experience panel, because they've been there, tried it and so to learn from other people's mistakes is really useful and valid to shape our service. Unfortunately this time around we couldn't involve experts by experience or service users in and throughout the process due to time constraints. Next time around on our recruitment we'd like to involve them more face to face, make it more personal, get their viewpoints from the off.

Staff interview

This issue raises broader questions around how projects ensure that a fresh and current service user voice is supported through a process of continually enabling new service users to participate in service design, delivery and evaluation. Further, the peer researchers also raised a query about the extent to which service users or 'expert citizens' are able to progress with some areas having expert citizens involved for the last two years at the same level.

Supporting service users

All projects provided some support for service users to get involved in the recruitment process. Support was normally part of a wider package of support for individuals but did include specific areas of support which related to key tasks/functions which they were required to carry out, particularly in areas such as commissioning and recruitment.

In some case formal training was provided:

Any of...the ex-service users who sat on the interview panel, would have received some training from the human resources department here, about interview processes, so they had an understanding of how to score people and what the expectations were for people sat on interview panels.

Staff interview

In other cases the training and support provided was more informal and reflected the specific needs of individuals:

I think they all received briefings. I don't think they received formal training. I know of four service users involved in the commissioning process...and service users were given specific training on that process, the commissioning process. Again, to enable them to get involved meaningfully so they could understand how the commissioning worked, the sort of things that they would be evaluating, what to look for, and how it would be scored as well. For the direct recruitment of staff, the expert citizens were given training on how to score and how to assess the answers from questions as well.

Staff interview

I spent an hour with them going through the questions, so it was more like-, I sat down with the two service users who were involved in that process and took them through the process. I've done that around everything, so an example of that is, if someone's coming to sit in on an interview panel and it's their first time, I will spend half an hour beforehand and go through that process so that they felt confident. If they didn't feel confident we supported them through that process really.

Staff interview

Service users mentioned that they would benefit from being given an explanation of key terms used around the recruitment process – for example, job description and person specification. Information on standard processes, interview formats, scoring and what is, or isn't appropriate to say in interviews. This is particularly important for those who are new to getting involved in supporting services. Where this had taken place it was seen as very beneficial

I'd never sat on an interview before, and obviously I hadn't worked before. They did a days training, you know, on what short-listing was, how to fill in an application form, which I thought was really good. Also it showed us about the scoring, it showed us, how to ask questions and just gave us a really good introduction into how to, you know, behave in an interview, how to understand interviews and all that. I did feel very supported in that.

Service user interview

The point was also made that service users need to be supported to become decision makers, not just to contribute to the process in a more passive role. To achieve this it may also be necessary to provide support to lead professionals to hear the messages of skilled service users.

I think that in order to make service user involvement really effective you need to spend the time making sure that you're not just saying to a service user, 'Come and sit on a panel tomorrow,' but that you train people, so that they feel confident about coming and representing their views. You empower them to have understanding about what it is that they're looking for.

Staff interview

Another issue which emerged from the interviews with service user was the importance of providing appropriate support for any new staff with lived experience appointed to roles on the project.

I do think that we need to give people support when it's their first job. You know, making sure that everyone's okay. You know what, not even just line managers, I do think it has to be a bit embedded in the programme, that everybody understands where people are at. ...There's different levels, as well, for people who've got lived experience but they've been employed for the past ten years, there's a big difference between that and me starting my first day. I felt like that anyway. So that support, I think it really does have to be tailor made.

Service user interview

Benefits of service user involvement in recruitment

All of those interviewed for the project expressed strong support for service users being involved in the recruitment of staff. The main benefit described by both professional staff and service users was the different perspective offered by those with lived experience of some of the main issues and accessing relevant services:

I think that the more people with shared experience dotted around in jobs all over is the best way, you know, to create a system change. Help people understand and get a bit more diversity in the workplace.

Service user interview

I think that the service users definitely give a different perspective and I think that's particularly important in working with this client group because the whole purpose of the programme in terms of supporting people is about engaging with people with complex needs. The input that expert citizens or service users have, that's really invaluable, because they can validate what's being said, they can ask specific questions, and what's important is that they can tease out the commitment of people, and the passion for people, because, at the end of the day, people who are employed on the programme, they might have specific skills and experience, but that alone doesn't mean you can work effectively with people with complex needs. I think that input has been really good.

Staff interview

Using someone with lived experience you get a different picture of what perception you're looking for; they bring a different perspective. As a professional, you have an idea of what you want to fit in the box of the corporate thing that you have to fill, so you miss certain things. I guess it's been invaluable really because they've brought a different angle on things; that's been fabulous to be quite honest, because you just think, 'Wow, I wouldn't have thought of that.' They also bring their experience around not just their life, but their experience around the services that they've used, and the good, the bad and the ugly if you like. So I guess it's invaluable.

Staff interview

I really value service user involvement, service user input for the interview process. I think that they often will provide a different observation and feedback on an individual. It's really about what would they have wanted from a key worker or a support worker in their role and they're often best placed to provide that feedback. So I think their involvement is invaluable. I will continue to foster that in future recruitment.

Staff interview

The other main area which most interviewees described as a benefit of involving service users in recruitment was their ability to sympathise and empathise with other service users.

You've got that life experience, so you can more or less sympathise with them, what they're actually going through. I think that's better than somebody that doesn't know-, what you haven't been through. I think it's really helped knowing that they've actually been there or done something similar.

Service user interview

Another key benefit of involving service users was an increased likelihood of getting the right person in the right roles. This was largely reported as a perception of service users in this study, with some anecdotal evidence of appointments being unsuccessful where service users had not been involved, and vice versa. It would be useful if monitoring of this issue or further research could explore this issue as it could demonstrate financial benefits of service user involvement in recruitment.

Both aspects of these benefits – bring a different perspective and having empathy with other/current service users – were seen by many interviewees as strongly linked to achieving systems change through the initiative.

Going forward, system change is only going to happen with the voice of the service user ...professionals have a vision and an idea of what they think an individual needs as a treatment package. Until we start to really listen, and I mean really listen, to what people are saying to us, around service, around what we deliver, around what they need, then it's not going to change.

Staff interview

Many interviews touched on the benefits to the individual of being involved in the recruitment process. This could be in relation to feeling valued and helping people who have faced similar challenges to them.

However much they're involved in what you're doing, it's about making them feel a part of that – because that's about people feeling worthwhile and valued. That's what we've tried to do really, even if it's been a very very small part that they've played, it's about them being involved really.

Staff interview

There were also some quite practical benefits report by service users of the way in which being part of the recruitment process helped them to understand recruitment better themselves and which might thus help them to get a new job and to progress their career.

Sitting there and doing the training that we did [involving role-play of mock interviews], it gets you to see how you can actually portray yourself in an interview. It's given a better oversight of what you can look like in an interview, how bad you can come across when you don't need, and how bad a bad interviewer can be as well. It actually gives you-, actually looking at other people's applications, I enjoyed the short-listing I did because ...it does give you a good insight into how to put your application right and actually get it noticed. So yours gets read. I enjoyed it for that aspect.

Service user interview

Linked to this, one service user interviewed talked about how their involvement in the recruitment process had changed their self-perception of getting a job:

I think at one time I probably thought 'We'll never get jobs,' and all that, but it was interesting to have an input, do you know what I mean? At the beginning, you know, as time went on I did think, you know, 'Maybe I am employable,' because I didn't believe that I was at first, that's why I never went for one of those jobs.

Service user interview

Influence beyond Fulfilling Lives (multiple needs)

Some of the projects indicated that in addition to influencing the practices of those organisations funded through Fulfilling Lives (multiple needs) they were also have a wider influence on practices at other organisations.

...we're going to wider agencies and saying to them, you know, you need to involve service users in the recruitment and selection of your staff. You need to adopt the 'Ban the Box' campaign¹ so that offenders are given an equal opportunity to gain employment, because we see that as part of why we're here.

Staff interview

In other areas, this was something that was planned in for the future.

Obviously this project is a small part of what we do... and the whole provision within the city around people with complex needs. ...we can obviously use that experience and maybe extend the involvement of service users in recruitment more widely across other projects when they're recruiting. We can share with other providers our experience, and possibly help them do something similar.

Staff interview

¹ Ban the Box calls on UK employers to create a fair opportunity for ex-offenders to compete for jobs by removing the tick box from application forms and asking about criminal convictions later in the recruitment process. - See more at: <http://www.bitc.org.uk/programmes/ban-box#sthash.evnwf2Xq.dpuf>

04. RECOMMENDATIONS

This section outlines our recommendations for involving service users in the recruitment process, informed by our peer research project.

Recommendations for involving service users in staff recruitment

Following the same structure as that used to describe our key findings, we set out here a number of recommendations for involving service users in staff recruitment.

Strategic Commitment for Service User Involvement In Recruitment

Service user involvement is one of the fundamental principles set out by the Big Lottery Fund (the Fund) for the Fulfilling Lives (multiple needs) initiative. Service user involvement is at the heart of programme design, delivery and of local and national evaluation. Involving service users in the recruitment of staff is a crucial part of ensuring the right workforce is in place.

It is important for organisations to demonstrate strategic support for involving service users in staff recruitment. Strategic support does not just happen amongst senior leaders and it is important that this is also evident amongst middle managers, front-line workers and volunteers. Having the political will and commitment to involve service users in this way is a fundamental part of making it happen.

Strategic support can be evidenced in statements made by senior leaders and in policies and procedures produced for recruitment processes. Policies and procedures should set out how service users can be meaningfully involved in each stage of the recruitment process. This should include how checks will be made to ensure policies are being adhered to. Organisations should consider what information can be collected through the recruitment process to both demonstrate their commitment to involving service users and also any measurable benefits of this – for example, success in recruiting staff (e.g. the number of potential applicants for a role, not having to re-advertise), staff retention/progression and any financial benefits associated with this. Capturing such information would also provide evidence towards measuring whether an overall change in the system is being achieved.

Partnership working and influence beyond Fulfilling Lives (multiple needs)

The Fulfilling Lives (multiple needs) initiative requires the 12 funded areas to work in partnership to ensure:

- better co-ordination of provision between those delivering services and those commissioning services;
- that all the agencies providing services are providing a tailored, holistic and connected service.

Partnership working is necessary for any services providing support for people with multiple needs. Organisations should consider the working relationship they have with other organisations and how they can positively work together to ensure service users are involved in the process. Where aspects of service delivery are commissioned out to other organisations – as is the case for Fulfilling Lives (multiple needs) – the commissioning organisation should make it a condition of the contract that service users are involved in staff recruitment and could also set out the ways in which they expect this to take place.

There is also a role for Fulfilling Lives (multiple needs) projects to exert a wider influence, not just across its immediate partner organisations but across the sector as a whole to influence service user involvement in recruitment. This could be achieved by modelling a successful approach in their own organisation, sharing information about what has worked well, how, and in what context. It might also be appropriate for service users to provide direct support to another organisation.

Stages of the recruitment process

When considering service user involvement in recruitment there is a tendency to focus on the interviewing stage of the process. Organisations should consider and have a written plan/procedure for how service users will be involved in all stages of the recruitment process. This should include details of the relative contributions of service users and professional staff to the recruitment process. For example, for the interview stage of the process, this might mean setting out the scoring process, such as 20% test; 40% professional panel; 40% service user panel. The following sections look at the main stages of the recruitment process in more detail.

Stage 1 – Job Descriptions and Person Specifications; advertising and promoting opportunities

Developing an appropriate Job Description (JD) and Person Specification (PS) for a role is the starting point of the recruitment process. To ensure that the JD/PS meets the business need identified for the role it is important that service users are involved. More than one service user should contribute to this process. In the case of Fulfilling Lives (multiple needs) projects it may be necessary (depending on the role) to consider service user representation from the four main areas of need: substance misuses, mental ill health, offending and homelessness. A new or existing forum of service users could be convened to review JD/PS for a role. Whilst it may not be practical, or desirable, to have a completely blank sheet for this process, it is also important to ensure that the JD/PS is not effectively already written before service users input to the process.

JD/PS should clearly set out the value given to applicants with lived experience of the relevant needs of the post. JD/PS should seek, wherever possible, to give lived experience equal weighting with more formal qualifications. Other practical steps should be taken to encourage applications from those with a history of offending, such as signing up to ‘Ban the Box’², encouraging those with a criminal conviction to apply for roles.

How and where opportunities are advertised and promoted is another key aspect of encouraging applications from a wide pool of potential candidates. Service users have a useful role to play in this and should be consulted about appropriate ways of promoting the opportunities and encouraged to do so through their own networks.

It is also important for funding bodies – in this case the Big Lottery Fund – to allow some flexibility in their own requirements around staff recruitment to facilitate the involvement of service users. For example, this could be around where the posts are advertised or about the time-scales necessary for the process to be completed.

Stage 2 – Short-listing

Short-listing is the first stage at which prospective candidates are filtered out of the selection process. As such, service users should be involved in this process in the most appropriate way as determined by the organisation and the specific role being recruited. Usually this would be undertaken by those individuals who will also take part in the following stage of the process, interviewing. Service users could undertake short-listing as together with professional staff or as part of a separate process. If the latter, it should be clearly set out how the service users short-listing will contribute to the overall process.

Whilst not an issues emerging from this research project, if it is useful to include some sort of test or scenario as part of the recruitment process, again this could benefit from service user involvement to make sure that it helps the organisations to learn more about the prospective candidate in a way which is relevant to the role.

Stage 3 – Interviewing

Interviewing is the critical part of the recruitment process at which the final decision is made to appoint new staff into post. For those services supporting people with multiple and complex needs getting service users involved in the recruitment of staff is a crucial part of getting the right person into post. If the post requires working across different needs/services – i.e. substance misuse, offending, homelessness and mental ill health – then projects should consider the extent to which these different needs can be represented on the panel by service users. This does not necessarily mean having four different service

² Ban the Box calls on UK employers to create a fair opportunity for ex-offenders to compete for jobs by removing the tick box from application forms and asking about criminal convictions later in the recruitment process. - See more at: <http://www.bitc.org.uk/programmes/ban-box#sthash.mCDFukul.dpuf>

users with experience of different needs as many will have experience of more than one anyway.

During the interviews and during the analysis session with peer researchers there was discussion about whether a separate service user panel or involving service users on one panel was preferable. Ultimately, there was not necessarily a preference for one approach over another. It was felt that both models could be successful and the key recommendation is that service users have an independent voice and carry equal weight to that of other individuals involved in the process, regardless of what approach is adopted for the interviewing stage.

Service users who participate on interview panels should develop their own questions and this may be something which a wider group of service users is able to feed into. They should have a say in how their questions fit with others and their questions should carry equal weight in terms of scoring and assessment. Service users should also have an input to the overall wording and tone of all questions being asked in the interview, not just their own. Service users – and other interview panel members – should all sign-off that they are happy with all aspects of the interview process, including questions, prior to the interviews.

Stage 4 – Decision Making

Service users should have a say in the final decision regarding recruitment. The opinion of service users should carry equal weight to that of any other individual involved in making the final decision regarding recruitment. The process for making the final decision should be set out in the relevant policies and procedures. This should include details of any scoring-system in place and the relative weightings given to different aspects of the process. For example, 20% for the test, 40% for the panel of professional staff and 40% for the service user panel; scoring for interviews is 0-10 for response to each of 10 questions marked individual and averaged for the panel as a whole.

Selecting service users for involvement in recruitment

The main recommendation around selecting service users for involvement in the recruitment process is to ensure that there is a variety of service user voice involved in the process. Organisations should try to ensure that a variety of service users can be involved in the different stages of the recruitment process. Service user groups could contribute to the development of JD/PS and a number of individuals could be trained and supported to participate in short-listing, interviewing and making the final decision on appointments.

A general point which emerged from this research project was the extent to which ‘the same faces’ are seen as providing service user involvement in a range of different activities. Organisations need to have a process in place for a variety of individuals to get involved and for those individuals to progress their development through their involvement and into other areas of work. Having a larger pool of individuals trained and able to get

involved in recruitment will also allow back-up when individuals are not able to attend or have to drop out of the process for any reason. Organisations should seek to have service users from all relevant areas able to participate in recruitment. For this initiative that means substance misuse, mental ill health, offending and homelessness. Once a larger pool of service users able to participate has been developed, selection of those to take part should be a randomised process and not favour one or two individuals.

It is acknowledged that the practicalities of time-scales and the fact that projects were just setting up and did not have their own service users to draw on were factors for Fulfilling Lives (multiple needs) projects trying to involve service users in recruitment.

Supporting service users involvement in recruitment

Providing the necessary training and support is essential to enabling service users to take a meaningful role in the recruitment of staff. Organisations should provide training and support as necessary on the practicalities of making a meaningful contribution to the recruitment process. This should align with any wider training and support being provided to individuals. The following areas of learning should be considered:

- understanding Job Descriptions and Person Specification (purpose and content)
- different approaches to recruitment – e.g. behavioural versus competency models
- policies around ‘Fair and Equal Selection’, including approaches such as Two Ticks³ and Ban the Box⁴
- short-listing processes and any scoring systems in place
- devising appropriate interview questions
- conducting interviews – what can and can’t be asked; how to score responses to questions; reaching a consensus on decisions

In addition to training/learning support, it is also important for organisations to consider any practical support which individuals need to sustain their involvement in the recruitment process. For example, providing money for travel and subsistence and taking into account any potential impact on benefits.

Benefits of service user involvement in recruitment

Demonstrating the benefits of service user involvement in recruitment is a key part of securing strategic support for it and of influencing other organisations across the sector. It is recommended that organisations publicise the way in which they involve service users in recruitment and the benefits this brings to encourage others to adopt and embed similar practices. The benefits are twofold: for the individual involved and for the organisation seeking to recruit new staff. At an individual level service users develop a better

³ The Two Ticks is a Government backed approach to encourage applications from disabled people, retention in employment and increasing staff awareness of issues around disability. Further details available here: <https://www.gov.uk/recruitment-disabled-people/encouraging-applications>

⁴ ibid

understanding and gain experience in the recruitment process. It also demonstrates that the organisation values them and the lived experience that they can bring to the process, along with their existing skills and knowledge. They can apply their knowledge about the recruitment process in furthering their own career and develop their confidence and self-esteem through taking a meaningful role in the process.

Employing service users

Whilst not the main focus of this research project the interviews did touch on the extent to which former service users and those with lived experience have been employed by the 12 funded projects. It is estimated that around 20% of staff employed at projects may have experience of the four principal needs relevant to Fulfilling Lives (multiple needs). However, caution needs to be taken with this as it is a very rough estimate, as this information is not routinely collected by organisations. Some key recommendations emerge from this.

It would be really useful for organisations to keep a record of what proportion of their staff and volunteers have experience of multiple needs and accessing relevant services for support. Individuals do not have to disclose this information and some may choose not to. So there will be limitations on the accuracy of information, however, despite whatever caveats need to be used with the information, it would be useful to track how this changes over the lifetime of the initiative. It would also be interesting to explore the relationship between the proportion of employees with lived experience and systems change.

Whilst not the main focus of this research, another key recommendation which emerged was that, where former service users are successful in securing a job, there needs to be additional, flexible support available to those individuals to support their transition into employment.

Recommendations for supporting national peer research projects

Overall, peer researchers were very positive about their experience of completing this research project, as were the professional researchers providing support and guidance. One peer-led research project will be completed each year for the remaining period of Fulfilling Lives (multiple needs), with a total of six projects completed between 2015 and 2021. The topic volunteers for the next national peer-led research will be chosen at the August 2015 meeting of the National Expert Citizens Group. Those peer researchers involved in the first project have the option of staying involved in the next project, should they wish to do so. Other members of the NECG can also volunteer to undertake the next research project.

Reflecting on the process of completing the first national peer-led research project, the following recommendations are made for the next project:

- More tailored training in research methods, particularly on the specific method chosen for the project. For example, training on conducting and analysing semi-structured interviews with opportunity to practice before the fieldwork.
- Practical training where relevant – for example how to get the best out of any equipment (e.g. using voice recorders, cameras), how to upload and share large files securely, etc.
- Clear communication of the purpose of the research and how findings will be reported. In particular, clarity regarding whether or not individuals or projects will be named in the report or any other outputs. A local contact and champion for the research in each project would be useful.
- Need to be aware of research/evaluation fatigue brought about by the demands for national and local evaluation. More evident for staff than for service users.
- Need to have a flexible approach to the methodology and be open to changing it. In the first project when it proved difficult to negotiate interview dates and times, phone interviews were conducted instead of face-to-face.
- Consider creative, different ways in which peer researchers can be supported to play a bigger role in the analysis and reporting stage of the research project.

APPENDIX A – SERVICE USER INTERVIEW GUIDE

Programme Area	
Name of interviewee	
Role	

Explaining what the research is about

Some people who have previous experience of issues like homelessness, being an offender, drugs and alcohol and mental health issues are now involved in helping to make services better for people with those issues.

As part of this work a small group of former service users are undertaking some research into how projects have involved service users when recruiting new staff, for example, whether service users had any part in the interviews. We will be speaking to staff and to service users who have been involved in this. The purpose of the research is to find out what has worked best in involving service users to make recommendations for future recruitment activities.

This interview might last around 30 minutes. There are no right or wrong answers to any of the questions; we just want to know your opinion about things. If you can't answer any of the questions, or don't want to, that's fine and you can end the interview at any point if you want to. Your name will not be given with any of comments you make.

Do you have any questions about the interview?

Can I ask your permission to record the conversation? This helps make sure that I can listen to what you are saying and don't have to try and write everything down. We will delete the recordings when they are no longer needed for the research.

Notes for interviewer:

Key questions to cover are numbered below and some additional prompts for further information are written in italics, in case you need to ask them, but people may cover them without needing any prompting.

Some people will cover more than one question in an answer and may answer questions in a different order than we have them below: this is absolutely fine. You may also think



of other questions that you want to ask: this is also fine, ask them!

It does not matter if people answer the questions in a different order or if the interview jumps about a little or if you think of an extra question you want to ask. The main thing is to try and at least cover all the key questions listed below.

Background

1. Please could you tell me a little about your role and the work you do at **[organisation name]** on the Big Lottery Fund, Fulfilling Lives programme?
 - *How long have they being doing that role?*
 - *Have they done more than one role?*
 - *Is their current role, and any previous roles, voluntary or paid, full-time or part-time?*
2. Did you apply for any of the jobs that have been advertised? If so, what happened? If not, why not and did anyone encourage you to apply for any roles?
3. Can you describe any involvement you had in developing the bid to get the Big Lottery Funding?
 - *For example, attending interviews or meetings at Big Lottery Fund, arranging for groups of service users to meet up, etc.*

Service user involvement in staff recruitment

4. To what extent were service users/ individuals with lived experience involved in the recruitment of staff to your project?

If not covered, ask about the following:

 - *Writing the job descriptions and/or person specifications*
 - *Advertising/promoting the opportunities*
 - *Writing questions for the interviews*
 - *Meeting the candidates on the day*
 - *Interview panels (How were these designed? Was there a separate panel of ex/service users?)*
 - *Decision making*
 - *Feeding back to candidates after the interviews*
5. Can you describe any training or support you were given to help you get involved in the recruitment process? (If they did not need any help, were they offered any?)
6. Was there any help or support you felt you needed but did *not* get?

Employment

7. How many of those who are currently employed by your project/partnership have previous experience of things like homelessness, offending, drugs & alcohol and mental health problems? What proportion of all employees is this? (again, approximately if don't know exact figures)
 - *Has this changed since the project was launched?*
 - *Did any job roles have criteria that specifically referred to lived experience or expert/ex service user? (for example as a desirable criteria)*
8. What type of roles do people with previous experience of these issues (listed above) have?
 - *For example, admin roles, coordinating service users, management or leadership?*
 - *Are they mainly voluntary or paid, full-time or part-time?*

Reflections

9. What have you learnt about involving service users in this recruitment process?
10. On reflection would you have done anything differently? (What? Why?)
11. What recommendations would you make for future recruitment of staff?

Thank you for taking part in this research. Is there anything else you would like to see that you feel we haven't covered in the interview? Do you have any questions for me?

APPENDIX B – STAFF INTERVIEW GUIDE

Programme Area	
Name of interviewee	
Role	

Introduction

The National Peer Research Group is a sub-group formed by members of the National Expert Citizens Group for the Big Lottery Fund initiative *Fulfilling Lives: Supporting people with multiple needs*. The group has chosen to focus its first piece of research on investigating the contribution and involvement of service users, or individuals with lived experience, in recruitment activity carried out by projects during the initial start-up phase.

As part of this research we are conducting a series of interviews with key stakeholders across the 12 partnerships and carrying out focus groups with service users. The purpose of the research is to share learning from the recruitment process and identify examples of good practice to make recommendations for involving service users in future recruitment activities

This interview will last around 40 minutes. The interview will be conducted according to the Market Research Society Code of Conduct. You do not have to answer any questions which you feeling unable or willing to do so and you do not need to give us a reason for this. You can end the interview at any point. Your name will not be associated with your individual comments.

The data collected through this interview, and other research activity, will be collated and analysed by the National Peer Research Group.

Can I just ask your permission to record the conversation? This helps us to capture and analyse what has been said more efficiently. We will delete the recordings when they are no longer needed for the research.

Notes for interviewer:

Key questions to cover are numbered below and some additional prompts for further information are written in italics, in case you need to ask them, but people may cover

them without needing any prompting.

Some people will cover more than one question in an answer and may answer questions in a different order than we have them below: this is absolutely fine. You may also think of other questions that you want to ask: this is also fine, ask them!

It does not matter if people answer the questions in a different order or if the interview jumps about a little or if you think of an extra question you want to ask. The main thing is to try and at least cover all the key questions listed below.

Background

12. Please could you tell me a little about your role at **[organisation name]** and your role in relation to the Fulfilling Lives programme?
13. What involvement did you have in the process of recruiting new staff to work on this programme?

Developing the bid

14. To what extent were service users/ individuals with lived experience involved in the design and development of your project?
 - *How were they involved?*
 - *What did they contribute?*

Project team recruitment

15. To what extent were service users/ individuals with lived experience involved in the recruitment of staff to your project?

(If applicable) How did you involve service users in the recruitment process?

- *Writing the job description and person specification*
- *Advertising/promoting the opportunities*
- *Developing questions for the interviews*
- *Agreeing short-listing criteria or scoring-systems for the interviews*
- *Interview panels (How were these designed? Was there a separate panel of ex/service users?)*
- *Decision making*

16. Was any aspect of the recruitment process done by a separate recruitment agency? If so, how did they involve service users in the process.

17. How did you support/enable people to make a meaningful contribution to the process?

— *Was any training provided to support experts in being involved in the recruitment process?*

Employment

18. For context, how many people are employed on your Fulfilling Lives project? (approximately if don't know exact figures)

19. How many of those are currently employed by your project/partnership have lived experience of multiple/complex needs? What proportion of all employees is this? (again, approximately if don't know exact figures)

— *Has this changed since the project was launched?*

— *Did any job roles have criteria that specifically referred to lived experience or expert/ex service user? (for example as a desirable criteria)*

20. Was any pre-planned support put in place to aid their transition into employment?

— *How were they supported?*

21. What roles are they undertaking?

Reflections

22. What have you learnt from using service users in this recruitment process? What recommendations would you make for future recruitment of staff?

23. How could this be used to inform/influence system change moving forward?

24. On reflection would you have done anything differently? (What? Why?)

Thank you for taking part in this research. Is there anything else you would like to see that you feel we haven't covered in the interview? Do you have any questions for me?

APPENDIX C –GUIDE TOP SEMI-STRUCTURED INTERVIEWS

Guide to semi-structured interviews

Client: Big Lottery Fund
Project: Supporting people with multiple needs
Date: December 2014
Author: Jon Adamson

This short guide explains how to conduct semi-structured interviews to gather the vital information needed to show the impact these programmes are having.

Doing semi-structured interviews

Semi-structured interviews are a way of creating a relaxed environment for a conversation in which the person being interviewed can talk freely and openly while ensuring that the person doing the interview gets the information they need to find out.

This is achieved by working out a set of questions beforehand which will cover all the important things that the interviewer wants to find out. When doing the interview, the interviewer can change the order of the questions, miss out those questions already answered by the interviewee and give some extra explanation where required. The important thing is to ensure that all the questions are answered; the order and precise instructions given are less important.

Semi-structured interviews are the most common type of interviewing and produce explanatory, qualitative information – about why something might have happened – rather than quantitative descriptive information often generated by surveys or questionnaires – such as the percentage of people who think a certain thing is true or false.

The national group of peer researchers, with support from CFE Research, have developed a question template for their research into how service users were involved in the recruitment process for *Fulfilling Lives: Supporting people with multiple needs*. This is available as a Word document and will be the 'topic guide' which researchers use in the interviewing process.

The three stages of semi-structuring interviews:

Stage 1 – Introductions and warm up: Introduce yourself, explain the purpose of the interviews and what will happen with the information they provide (confidentiality & anonymity). Give them an idea of how long you think they might take. If you are taking notes or recording the interview tell them before you start doing it. Remind them that they do not have to answer any of the questions if they don't want to and that it is their right to withdraw from the interview at any time, without reason. After this ask a few simple, non-threatening questions to help them relax – e.g. how they get there, what they did the night before, etc.

Stage 2 – Doing the interview: Move on from the warm up questions into the first question on your list of things to cover and progress through the questions you have set out to cover in a logical progression. This may mean changing the order around, depending on the interviewee's responses. You may also want to go back to questions if you don't think they were answered very fully first time around, for example, some of the early questions might be worth revisiting once you have built more of a rapport with the interviewee and they have relaxed a little. Use prompts and probes to encourage the interviewee to talk more and try and capture as much information as possible. Don't be afraid to check they've understood your question correctly and that you've understood their answer correctly.

Stage 3 – Closure and cool down: Once you've covered all the important things you wanted to know, ask a few more trivial questions to indicate that the interview is coming to an end and help the interviewee to relax. Sometimes, you can illicit some really useful information at this stage as the interviewee may relax more and be less guarded so keep your recorded going and have your pen in hand! Thank them for their time and remind them of what you will do with the information and how they can find out more. Give them your contact details for if they have any questions at a later date.

Five top-tips on carrying out successful semi-structured interviews:

1. **Listen** much more than you talk and remember that a shared silence will sometimes encourage people to fill it by talking more!
2. Remain **neutral** – clarify what is said by repeating it back to the interviewee rather than expressing an opinion, e.g. don't say 'oh that's awful/great'
3. Capture as much **information** as you can – write down all the things you think are important (even if you are recording the interview)
4. **Prompt and probe** – rephrase questions if they aren't sure what you mean, add supplementary questions such as 'why do you say that' and 'can you explain that to me a bit more please'.
5. **Enjoy** it! ...or at least pretend you are! Use relaxed, open body-language, smile, be polite and gracious – they've given up their time to help you.

APPENDIX D – NOTES FROM FIRST TRAINING AND PLANNING SESSION

National Peer Research Group

Client: Big Lottery Fund
Project: Fulfilling Lives: Supporting people with multiple needs
Date: October 2014
Author: CFE Research

This document provides the notes taken during the first training/planning event for the National Peer Research Group (NPRG). The group was facilitated by CFE Research with the objective of discussing key areas of research the group wishes to investigate further and planning how to make it happen.

What do we want to know?

Recruitment of service users by projects

- *Who's been hired?*
- *What roles are service users/ individuals with lived experience going into?*
- *Why were they hired?*
- *How many people with lived experience are working on the project?*
- *To what extent were service users involved in recruitment?*
 - *Probe job description design/ person specification*
 - *Short listing*
 - *Interview panel*
 - *Selection criteria*
- *How were the posts advertised/ promoted*
 - *Any incidences of secondment*
 - *Were volunteers invited to apply / offered these jobs*



Who do we need to speak too?

- *Lead partners - HR departments - regional managers, senior managers; middle managers*
- *Service user groups*
- *Other partners and organisations*
- *Recruitment agencies*

Research question: To what extent have people with lived experience been involved in all aspects of the recruitment process for the 12 projects funded by Big Lottery Fund?

Research design

The below summarises the various research methods that were discussed by the group.

Research method	Advantages	Disadvantages
Literature review/ internet searching	Take advantage of previous (more expensive?) research; don't duplicate what's already done; find out info on competitors; see change over time/geography	Not your questions/research; may be out of date or not relevant
Surveys all	Can involve large numbers of people; can generalise about a group: good descriptive data; generates good descriptive quantitative data	Don't get detail or explanation- purely descriptive
Surveys: Postal	Can use visual presentations; can reach those without private internet access	Time-consuming; low response rate; requires data entry
Surveys: online	Quick, easy & cheap to reach larger numbers; no data entry; Can't make sure questions understood	response rate may be low; not sure of identity/ characteristics of respondents
Surveys: phone	Often most convenient option for participants	Can't use any visual input; may be difficult to capture information
In-depth interviews (Telephone and face-to-face)	Get rich detail behind thinking/behaviour; can explore sensitive subjects	Write-up very time-consuming; can't generalise about others
Focus groups	Generates good qualitative data; insight into meaning behind decisions/ behaviour; participants can explore issues they're interested in not just your pre-defined questions	May not be representative and therefore can't generalise; can be expensive/difficult to arrange; attendance may be poor; can be difficult to facilitate & capture info
Mystery shopping	Relatively simple to implement, equivalent to asking other users for their experience Flexible and immediate; It should enable particular service areas to be highlighted and it should allow possible problems to be investigated quickly	Staff are often suspicious of schemes (unless briefed thoroughly); Only gives instances and small samples; Regular mystery shoppers could get too experienced or well known
Observation	Group is in a natural environment	Cannot get at groups/ individuals thoughts, costly to run

Research plan

Owing to the size of the population of interest, survey research (quantitative research more generally) was discounted by the group. The group decided that the individuals that they wanted to consult were 'Service user groups' and 'lead partners'. The group overall favoured a focus group approach with 'Service user groups' and intends to facilitate their own focus group with support from a colleague to act as note taker. It was recommended that the discussions are recorded using a Dictaphone, and following the Market Research Society Code of conduct⁵

It was agreed that the NPRG will not conduct research within their own project area. The below table sets out where members of the group will engage and carry out their research.

Project area	Lead researcher
Stoke-on-Trent; Birmingham	Aaron
West Yorkshire; Liverpool	Justin
Bristol; Brighton and Hove; Camden and Islington	Nash
Manchester; Lambeth, Lewisham and Southwark	Sandra
Newcastle; Blackpool; Nottingham	Scott (Danielle)

Focus group questions

CFE Research will provide an example of a focus group script to aid in the development of a similar guide for the focus group for this project. Some indicative questions raised by the group to ask service user focus groups include:

- *'Involve-ometer'* How valued do you feel within the Fulfilling lives programme? – the group suggested a line with a 1-10 is written on a white board encouraging attendees to mark where they feel they are on this scale. Facilitators to then probe reasons for their score.
- *How much were you involved in the recruitment process?* – 1= not at all 10= completely involved
- *'Snapshot'* Consider taking a camera/ use of phone camera to the focus groups and inviting attendees to write a few words / of sentence on their views of the recruitment process.

⁵ <https://www.mrs.org.uk/pdf/mrs%20code%20of%20conduct%202014.pdf> – in particular the areas around informed consent – Section 13



Actions

At the end of the meeting the following actions and next steps were agreed

— *CFE Research to:*

- *Speak to Big Lottery regarding research expenses*
- *To inquire whether the research can be included as an agenda on the England committee*
- *Provide input to questions to lead partners – to be conducted on a one-to-one basis*
- *Provide template e-mail introduction to project leads*

— *Everyone to feedback to service user group*

— **17th October** – *Each member of the research team to draft up to 15 questions for key partner interviews*

— *Request service user statement section from all project business plan*

— **24th October** – *finalise the interview guide*

— *Draft focus group*

— **13th November** – *Pilot focus group activities at expert citizen event -*

— **19th November** – *Finalise focus group format*

— **January 2015** – *Conduct Fieldwork*