

# Collaborate and Succeed

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An evaluation of the COMPASS Masterclass  
in consumer involvement in research

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## About TwoCan Associates

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TwoCan Associates carry out R&D and provide training and support to help voluntary and statutory organisations involve people who use services in their work.

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# Executive summary

## Background

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The COMPASS Collaborative is one of two National Cancer Research Institute-backed research groups focusing on supportive and palliative care.

COMPASS ran a Masterclass on consumer involvement for researchers called '**Collaborate and Succeed with Service Users**' which was held four times during 2009-2010. The Masterclass was conceived, developed and delivered by two service users, supported by researchers.

The Masterclass was an interactive workshop which included pre-course work, a discussion about how to engage service users throughout the research cycle and small group work. The core message was that involvement could help solve some of the practical problems faced by researchers. Participants were encouraged to involve service users much earlier and at more stages in the research process.

## Our approach

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We evaluated the impact of the Masterclass by interviewing ten of the participants and the service users, researchers and staff who developed and delivered it. We spoke to the participants about a year after the class to find out whether it had made a difference to their practice.

## What we found

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**The Masterclass did make a difference to researchers' practice in the long term.**

What each person got out of the class very much

depended on the issues they brought with them – so the impact was very wide-ranging. Participants said the class gave them the motivation, enthusiasm and know-how to take forward consumer involvement. It changed their practice by making them think about involving service users much earlier and at every stage of their project, as well as making involvement an integral part of their day-to-day activity.

The Masterclass also gave participants the evidence they needed to be able to persuade others of the benefits of involvement.

### **Researchers attended the Masterclass because:**

- They wanted to improve their knowledge and skills – even though they already had experience of involvement.
- They wanted help with involving service users and planning involvement when writing a grant application.
- They had moved jobs and wanted to check they were meeting the standards in their new organisation.
- They had been promoted which had brought them more personal responsibility for involvement.

Some participants were not expecting to acquire new skills, but just as importantly, wanted reassurance they were following best practice.

### **The Masterclass was successful because:**

It was facilitated by service users – service users who were highly-skilled trainers and very

experienced in consumer involvement. This made the class more credible. The facilitators provided an authentic report of 'what it's like for the service user'. This was highly valued.

The class was interactive, action-oriented and directly relevant. It helped participants see that consumer involvement could be a solution to the problems they were grappling with at the time.

Participants learnt a lot from each other. The facilitators created an environment where it was safe for participants to discuss their experiences of where involvement had 'gone wrong'.

### **Participants thought the class could have been improved by:**

- Providing mechanisms to support ongoing shared-learning and communication e.g. regular newsletters, use of social media and a database of alumni.
- Providing training to research teams to help embed involvement at all levels and to overcome any barriers linked to the attitudes, skills and awareness of different individuals.

### **What we learned**

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The approach used by the Masterclass, i.e. a focus on using consumer involvement as a way of solving practical problems in research, was highly productive and well-received.

Researchers at all levels from the most senior to the most junior benefit from training in consumer involvement.

Different kinds of researcher need a different type of training depending on their research background (for example qualitative versus quantitative) and their prior knowledge and experience of involvement (whether they are

completely new to the concept or want to improve their practice).

Training should not be a one-off event, but needs to take the form of continual professional development, to enable researchers to develop their skills over time and find solutions to newly emerging barriers to involvement.

Some researchers may benefit from ongoing support to help them apply the general principles of best practice to the specific context of their research.

## **Recommendations**

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### **Recommendation 1**

Training in consumer involvement should be planned and scheduled to fit with key stages of researchers' careers and/or the research cycle e.g.

- Funders should provide this training prior to calls for proposals or in parallel with the annual grant cycle
- Research departments/universities should provide this training as part of an induction package
- Attending this training should be linked to promotion e.g. it should become a pre-requisite for a senior fellowship or programme grant.

### **Recommendation 2**

A broad range of training in consumer involvement should be made available including:

- Introductory courses for researchers who are completely new to involvement
- Advanced training, using models similar to that of the Masterclass, for researchers who want to improve their practice
- Topic specific workshops to help some researchers overcome practical barriers e.g.

paying service users, recruiting to panels etc

- Training to develop the core skills and competencies required to effectively involve service users: e.g. facilitation and chairing skills.

### **Recommendation 3**

Senior researchers should be encouraged to attend training in consumer involvement. The training should also be championed by senior staff to motivate and encourage others to attend.

### **Recommendation 4**

Ongoing support for researchers should be provided either by consumer involvement support staff within organisations, and/or by developing mechanisms to maintain momentum and facilitate shared learning.

### **Recommendation 5**

Training should be delivered (or co-delivered) by experienced service users with training and facilitation skills. More thought needs to be given as to how to identify suitable candidates and how to develop their professional skills and experience.

# 1. Introduction

## 1.1 Aims of the evaluation

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This evaluation of the COMPASS Masterclasses in consumer involvement<sup>1</sup> in research aimed to address the following questions:

- Why did people decide to attend the consumer involvement Masterclasses?
- Did the Masterclasses meet the participants' expectations?
- Did the Masterclasses impact on researchers' practice?
- Did participants come across any barriers that prevented them from putting their learning into practice?
- What are the key lessons from the COMPASS experience?

Although the COMPASS Collaborative has come to an end (see Section 2.1) the findings from this evaluation will be used by key stakeholders within COMPASS to inform any future development of training. It is also hoped that the report will be useful to others in the field of consumer involvement with an interest in developing training for researchers.

## 1.2 The authors of this report

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This evaluation was carried out by Kristina Staley

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<sup>1</sup> COMPASS have used the term 'consumer involvement in research' to describe collaborative working between researchers and service users, where service users are active partners in the design, delivery and dissemination of research. This involvement is also often described as 'service user involvement' or 'public and patient involvement'.

from TwoCan Associates. TwoCan Associates carry out research and evaluations, and provide training and support to help voluntary and statutory organisations involve people who use services in their work. For further information see [www.twocanassociates.co.uk](http://www.twocanassociates.co.uk)

## 1.3 The structure of this report

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The remainder of this report is structured as follows:

- Section 2: Background
- Section 3: Methods
- Section 4: Findings
- Section 5: Lessons about the Masterclass
- Section 6: Lessons about training in consumer involvement
- Section 7: Recommendations

As far as possible the findings have been presented in the interviewees' own words. Direct quotes from interviewees are *in blue italic*. Quotes are attributed to:

- **core group members** – the team of service users and researchers with responsibility for developing consumer involvement within COMPASS,
- **facilitators** – the service users and researcher who ran the training, and
- **participants** – the researchers who attended the training.

## 2. Background

### 2.1 About the COMPASS Collaborative

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In 2002 the National Cancer Research Institute (NCRI) published a strategic review which revealed that only 4% of cancer research funding was being invested in the field of supportive and palliative care. In response, the NCRI established a Strategic Planning Group to develop recommendations to enhance research in this area.

The work of the Strategic Planning Group identified that the workforce was fragmented and that more collaboration and interdisciplinary working was needed, including better links with research outside the field of cancer. As a result, a scheme for funding interdisciplinary supportive and palliative care research was set up by a consortium of NCRI Partners: the Department of Health (England), Marie Curie Cancer Care, Macmillan Cancer Support, Cancer Research UK and the Medical Research Council.

The COMPASS Collaborative, which was funded for over five years through this scheme (2005-2011) aimed 'to research the development, evaluation and implementation of interventions to improve the supportive and palliative care of people living with cancer and other serious illnesses'.

The collaborative brought together researchers with a range of backgrounds from twelve UK universities. Through funding projects and training researchers, COMPASS helped to increase the amount of research that was undertaken collaboratively and also developed the research capacity in this field.

### 2.2 About the Masterclasses in consumer involvement

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COMPASS ran a series of Masterclasses on a range of topics for researchers working both within and outside of the collaborative. The Masterclass on consumer involvement 'Collaborate and Succeed with service users' was held four times, twice in London, once in Leeds and once in Edinburgh between 2009 and 2010.

These Masterclasses were developed by the COMPASS core consumer involvement group: Carolyn Morris and Peter Rainey, service users with considerable experience of being involved in research, and two researchers, Dr Marilyn Kendall, the consumer involvement co-ordinator and Professor Scott Murray, the lead for consumer involvement on the COMPASS Board. Carolyn and Peter were also lay members of the COMPASS Advisory Group which provided oversight of the work programme as well as feedback to the management group on strategic direction.

The core group agreed the aims of the consumer involvement Masterclass which were:

- To raise awareness of the consumer involvement already taking place across COMPASS
- To engage a range of researchers – not only postdocs but also professors and senior researchers
- To help researchers meet the demands of funders, ethics committees and other research organisations for demonstrable consumer involvement in their research projects

- To provide participants with greater knowledge of a range of methods for consumer involvement
- To enable participants to develop their current practice and develop their skills and confidence
- To enable participants to identify the immediate steps they could take to progress consumer involvement

As two of the **core group members** described:

*“ We wanted participants to see consumer involvement as something that is better done early. The key messages were to collaborate often, collaborate early, and see it [consumer involvement] as a way of overcoming problems in research – not as another hurdle. ”*

*“ A fundamental thing about the approach is that it wasn't ‘you ought to do it [consumer involvement]’ – but that ‘there are benefits for you if you do this’... so it was about what's in it for them, rather than a moral imperative. ”*

The development of the programme was led by Peter Rainey, who has a background in training and professional development in the private sector, and was familiar with using workshops as a way of enabling adult-learning, in particular self-directed learning. This approach informed the structure of the Masterclass as Peter, a **core group member** and **facilitator** of the class, described:

*“ It was very interactive, practical and action orientated. We agreed we shouldn't just be standing and talking to people about consumer involvement, we should be making them do work, and we should be making them do work that actually meant something to them.... then they could continue doing the work when they left the course. So it*

*wasn't in any way theoretical – it was entirely practical and that was the primary driver for the way we designed it. ”*

## 2.3 The Masterclass structure

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Masterclass participants were asked to carry out some preparatory work before attending the class. This involved considering where they were experiencing problems or difficulties in their work and how these might be overcome. The facilitators observed that those people who had done some of this initial thinking seemed to benefit most from the session.

The Masterclass took the form of an interactive workshop that lasted two hours and included:

- a presentation discussing the research cycle
- a discussion about the difficulties participants were experiencing in their work and the potential for consumer involvement to be part of the solution to these problems
- small group discussions on topics selected by the participants – first looking at a problem in more detail, then considering whether involving service users at a much earlier stage would have made a difference, and finally planning next steps, in terms of what the participants would do next in order to work more collaboratively with service users.

All the participants were given a list of resources signposting additional information and advice. They were also encouraged to contact the facilitators if they needed any further support.

## 3. Methods

This evaluation was undertaken between June and September 2011. It involved conducting short, semi-structured telephone interviews with:

- all four members of the core group
- the Research Support Officer who helped organise the classes
- ten consumer involvement Masterclass participants – including senior and junior researchers and COMPASS Board members.

The interviewees were purposively selected to include:

- people who could provide a perspective on the development and delivery of the classes
- a broad range of participants – including people from each of the four Masterclasses, with different research backgrounds, levels of seniority and prior experience of consumer involvement.

We attempted to interview COMPASS researchers who had not attended the training, with the aim of finding out how the classes might have been better marketed to the target audience. However, it proved difficult to find people who were willing to take part. Two people who did respond said they would have attended the class if they hadn't had prior commitments.

The interview schedules were developed with input from the core group and also drew on previous evaluations of consumer involvement carried out by TwoCan. The questions reflected the aims of the evaluation (see Section 1.1).

The interviews took place between 6-18 months

after participants had received the training. This enabled assessment of the long term impact and any changes to researchers' practice over time.

With permission from the interviewees, the interviews were recorded. The recordings were then transcribed and key themes identified. An interim report was produced after about half of the interviews had been completed. This was discussed with the core group, to review the interview questions and the emerging themes. The interview schedules were found to be working well and the overall approach to the analysis was agreed. The remainder of the interviews were completed and all the transcripts then analysed using the agreed framework.

All recordings and transcripts were deleted at the end of the project.

# 4. Findings

In this section we address the key questions that formed the basis of this evaluation:

- Did the Masterclasses impact on the researchers' practice?
- Did participants come across any barriers that prevented them from putting their learning into practice?
- Why did people decide to attend the consumer involvement Masterclasses?
- Did the Masterclasses meet the participants' expectations?

These will now be addressed in turn. All of the quotes in this section are from the Masterclass **participants** except where stated.

## 4.1 Did the Masterclasses impact on the researchers' practice?

The **participants** reported that the Masterclass gave them the motivation, knowledge and confidence to take forward consumer involvement. The training did not always lead to new initiatives, but often injected energy into existing involvement projects. The class had provided:

- **Momentum and enthusiasm**

*“ The Masterclass won over people’s hearts and minds – it convinced us to do it. It helped to change our minds from ‘having to do it’ – a tick box mentality – to thinking ‘this is something that could be useful for us.’ ”*

*“ Everyone in our department was keen on consumer involvement but nobody had enough experience. ”*

*“ The Masterclass gave useful practical suggestions... in a recent study our researchers have done it in the way suggested – using job descriptions. They talked it through and agreed how they would do it. So it enabled them to move in the direction they wanted to go in. ”*

- **Advice on best practice**

*“ It provided very tangible ways of how to do it. It was very practical. ”*

*“ When people are working with you collaboratively, it’s important you’re clear in your mind why you are asking people and what you are asking them, and at what point you want them to work with the team. ”*

*“ After the Masterclass, I went and recruited three user reps to work on my project. It gave very tangible advice on when to recruit, and how to do it and why you would do it – so that was helpful in then putting together a flyer, and a job description and finding different organisations to approach to help advertise the opportunity. ”*

*“ It helped me with thinking about looking for more than one consumer. It would be difficult to be the one person on a project who is not a professional researcher. ”*

- **A boost to researchers' confidence**

*“ I feel much more confident about recruiting users. I had experience of working with users within my organisation – but now going into the public domain, I feel much more confident. ”*

The **participants** also reported that the class had given them a deeper understanding of

of involvement, which had led to changes in their practice. As a direct result, they were now thinking about:

- **Involving service users at every stage of their research project**

*“ I found out consumer involvement is not just for dissemination – but for every stage of the project from grant application through to running the project through to dissemination. That is the biggest transformation for me about the understanding of consumer involvement. ”*

*“ We were able to think about where we could involve them in different stages and how to change our practice – so it’s made us even better. ”*

- **Integrating consumer involvement into their day-to-day activity**

*“ Consumer involvement is something that I will think about now for everything – when I’m designing a research project for example, I’ll be thinking about how I can involve service users in this part of the process rather than it being an added-on extra. ”*

- **Involving service users much earlier in the research process**

*“ The ultimate beneficiaries of our research will be the users – this is our main research aim – so the consumer involvement can help us from the very beginning to know what is important and what needs to be researched. ”*

*“ It opened our eyes to the fact that we’d not included patients in the design of studies before and I think now we’ll think about involving patients much earlier...if we were going to write another grant proposal we would include them right from the start to talk about ideas really. ”*

*“ It made me realise that I need to be more proactive*

*in finding service users prior to putting in bids... I need to make closer links with the consumer research panels that are available in our local setting – as a way of pre-empting some of the difficulties of identifying a suitable user at short notice. ”*

The **participants** also reported that the Masterclass had equipped them with useful information that they could use to influence others. It had provided:

- **The evidence to persuade colleagues that consumer involvement would be of benefit and had minimum risk**

*“ Going on the course and sharing what had been provided with colleagues acted as a catalyst to take things forward. It gave them a degree of confidence that I had received training about consumer involvement in a research context – from a provider who was known and respected, and the information showed that consumer involvement could happen without a great deal of risk. So I am very grateful to the course for that. ”*

- **Ideas as to how to ‘share the learning’ with others**

*“ Myself and a service user did a consumer involvement workshop at a conference. We based it round the work of the service user and the model that I went through on the Masterclass. We adapted it and shortened it. It was useful to get people thinking about their practice. I found it a really good way of thinking through how to take someone from what they are doing at the moment, through to what consumer involvement could look like in their situation and how to get to that point where they have involved service users in their routine activity. ”*

- **Strategies to deal with some of the barriers to involvement**

*“ For example people’s attitudes, in particular*

clinician's attitudes and beliefs about when is it appropriate to involve service users in the research process. Some folks tended to say that when it gets to the analysis stage then that's something that's reserved for the researchers – which I don't think at all – every part of the process should be open to service users. Some of the strategies that people have used to try to get that message across I've found really useful... it's useful to be fore-armed – as it might be something I encounter. ”

It therefore seems there were as many different impacts of the training as there were participants. This is in keeping with the overall ethos and approach to the Masterclasses; what participants gained from the class very much depended on the issues they brought with them.

#### 4.2 Did participants come across any barriers that prevented them from putting their learning into practice?

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Most of the **participants** reported working in an environment that supported consumer involvement which meant they hadn't experienced any real problems in taking their work forward:

“ The environment is really crucial and the support of your colleagues. I know I've got the support to deal with obstacles and get over those. ”

Some of the interviewees had access to local consumer involvement support services. They had found this additional help invaluable, particularly in applying the general lessons from the Masterclass to the specifics of their research project:

“ I haven't experienced any difficulties mainly because we have a consumer involvement support

person. They were hugely supportive. They looked at drafts of my flyers and job descriptions and sent me examples of others they had used, which enabled me to take it forward. ”

“ You need one-to-one help to integrate the theory into your research design... you learn the principles but you need to contextualise it to get the best value... you need to find a consumer involvement expert and sit down with them for an hour and get their advice... ”

The most common difficulty that the **participants** reported was a lack of time and resources for consumer involvement, particularly when developing grant applications:

“ I do speak to people but I am not sure I really involve them as well as I should... All the people I've spoken to, they've changed my attitude and perspective so I know what I should do... but things are going so fast. You have an idea which is so preliminary that you don't discuss it with anybody – then once it gets going, it all goes so fast. ”

“ The calls for research funding – sometimes the turn around time seems quite tight. Unless you already have relationships established with people, there doesn't seem enough time to facilitate that process in a meaningful way. The system encourages a tokenistic approach to involvement, even though a lot of policy documents and the application forms highlight the importance of involvement. ”

“ You need a lot of energy to set up those service user groups to enable those relationship-based dialogues that are needed to enable people to contribute their expertise. ”

“ The challenge has been keeping up the momentum. Lots of us were really enthusiastic after the class. We would like to set up our own forum – but we do not have the resources. Research

grants can include some of the costs – but there’s a lot of admin involved in running a forum – a lot of hidden costs which make it a challenge.”

“ I’m now developing projects from the ground up, so juggling a lot more. I can see in that juggling act – it would be easy to let consumer involvement drop.”

A number of the **participants** also commented that working in the field of palliative care poses additional challenges:

“ It’s difficult to find people who are at the end of life, but well enough to take part and commit to a long study. You may need their involvement over time – which may not be possible...”

“ Working on end of life care raises difficult issues that people need to think about it – you may need more time and money to support people and you need to factor that in.”

### 4.3 Why did people attend the Masterclass?

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The majority of the **participants** had a strong motivation to attend the Masterclass. The reasons they gave included:

- **Wanting help with writing a grant application**

“ I heard about the Masterclass through an email. In previous years I would have ignored these emails as I thought they weren’t relevant to me, but as I was applying for a grant and I realised that consumer involvement was an important part – I paid particular attention to everything related to consumer involvement.”

- **Wanting to inform their research team’s plans for consumer involvement**

“ It was something the research team were

interested in pursuing in terms of looking at the possibilities of patient and carer involvement in the research programme.”

- **Wanting to learn about other researchers’ experiences of consumer involvement**

“ I thought that would be helpful to touch base with people who had done involvement or were attempting to do that – but also to learn about good practice in involving patients and carers.”

“ I hoped it would be an opportunity to speak with people who are already doing consumer involvement work in my local area.”

- **Wanting to increase the level of consumer involvement in their research**

“ In the past I’ve had a distant relationship with people on steering groups and advisory groups... I wanted to find out about a different kind of approach and about involving people much earlier in projects. I’d always been a research assistant/associate, where I was working on pre-existing projects. Now having been promoted, I wanted to know how I could make sure I maintain consumer involvement at every stage of the projects I will be developing.”

- **Wanting to learn about a specific aspect of consumer involvement**

“ I wanted to recruit user representatives to our advisory group. When I’d worked at previous universities they had all had user groups involved with the various departments which meant you could go and present your project and people who were interested would put themselves forward. And so I hadn’t had to advertise more publicly for user representatives. I wanted to find out what was the best way to do it.”

- **Wanting to gain a more in-depth understanding of consumer involvement**

“ Some parts of consumer involvement are still not clear to me so I wanted to hear more about that. ”

“ I wanted to get a sense of what involvement means on a day to day basis within the organisation I work in and more broadly within this country... my project was including service users around the time of the class – so I hoped to get help with that. ”

“ I'd been a project manager in health and social services and involved users and carers for a number of years in that capacity – but not specifically in research. I wanted to learn about the research context when involving users and carers. ”

- **Wanting to learn about how to manage the working relationship with service users**

“ I wanted to know how to pitch it right. How much can we ask of patients? We don't want to ask too little of them and be patronising. How do you involve them right from the beginning of research? How do you involve people in the right way? ”

“ It can be difficult to manage people's expectations. Service users make suggestions but as the principle investigator, you have to decide which to take on board – and which you don't. Researchers don't always communicate that well enough to people who are not in the research community. There are sometimes unrealistic expectations in both directions. ”

Based on these reports, it seems there are key stages in researchers' careers when this training is particularly valuable:

- after moving to a new job – because researchers want to ensure they are meeting the standards in their new organisation
- after promotion – because this brings more personal responsibility for consumer involvement.

## 4.4 Did the Masterclass meet the participants' expectations?

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The Masterclasses did meet the expectations of the vast majority of the participants. Many participants commented that the training had been extremely valuable and informative, including two senior COMPASS Board members.

The feedback from the evaluation forms that were completed by **participants** on the day of each class showed that:

- 84% of participants found the Masterclass had met their expectations. A number commented that it was better than they expected because the sessions were more interactive and more useful than they had anticipated.
- 84% said their awareness of consumer involvement had increased. One person commented that the course had increased their motivation to become more active in consumer involvement.
- 92% said their understanding of 'how to do consumer involvement' had improved.

The interviewees also reported that the most useful parts of the class were:

- The small group discussions which provided opportunities to share experience and learn from colleagues

“ It was really really good because we did a lot of group work – so we all discussed how we could do it [consumer involvement] better and we came away with some ideas that some of the group have already implemented. ”
- Using the research cycle structure as this helped people to think through the different activities in a research project and the

opportunities for collaboration at each stage

*“ It was a nice overview of everything you could do. It showed all the different stages you could have consumer involvement – so I learned about that. ”*

- The service user facilitators who were able to provide the service user perspective and offer input into developing ideas (see also Section 5.1)

- Making connections with other participants and the COMPASS core group members

*“ It was nice to meet some of the facilitators and make some connections there – that was probably the most useful thing to me. ”*

*“ It was useful to run the Masterclass in a specific location as it helped us to identify the local sources of advice and support. ”*

From the **facilitators'** perspective, it seemed that some of the most valuable, immediate outcomes from the class were a boost in people's confidence and an awareness of a broader range of possibilities for consumer involvement.

# 5. Lessons about the Masterclass

These lessons are drawn from the interviewees' responses to the questions:

- What factors contributed to the success of the Masterclasses?
- How could the Masterclasses have been improved?

These will be considered in turn.

## 5.1 What factors contributed to the success of the Masterclasses?

The **participants** identified four factors that they thought had influenced the success of the Masterclass:

- Involving service users as facilitators
- Creating an environment where participants could be open and honest about the challenges they faced
- Careful planning and preparation
- The endorsement of COMPASS

These will be discussed in turn.

### ***Involving service users as facilitators***

**Participants** reported that having service users as facilitators greatly increased the credibility of the Masterclass:

*“ Having service users as facilitators, I think that was wonderful. They were really honest and they helped to demystify consumer involvement. They normalised it all and made it all ok. Service users are just everyday people that we can relate to – they are committed to this and want to do it. We're not burdening them. We're providing people with opportunities who want to contribute in this way. ”*

*“ I thought it was brilliant that the user reps from the COMPASS panel had such a lead on it – because they gave a perspective as to what is like from them as users and what was important to them – that's quite unique – often it's other academics telling you what they've done or INVOLVE telling you how to do it – having users guiding you through what they need to feel that they can participate and collaborate with you on a project was very helpful – I don't think I'd ever really had that before. ”*

*“ That's how it should be. It was absolutely how we should be doing it. Having very experienced user reps who were very able to lead and share their experiences and guide academics was very helpful. ”*

The **Research Support Officer** also thought the facilitators' openness about their experience of being involved was essential:

*“ Some researchers might be a bit reluctant to ask a service user if they weren't sure how ill they were or how much time they could ask them to commit to – to have a patient rep tell you that you should go talk to them and be explicit about what you need – I imagine gave people a lot more confidence than if it had been an academic saying this is how you engage users. ”*

### ***Creating an environment where participants could be open and honest about the challenges they faced***

Some of the most valuable learning for the participants came from discussing examples of where consumer involvement had proved problematic. This kind of discussion was only made possible because the facilitators created an environment where participants felt safe:

“ I felt completely at ease to bring up and discuss things I felt I was unsure about and that’s what I needed to say... how you do this or what do you think about the fact I’ve done it this way – is that the best way? ”

“ Everyone was quite open, particularly about some of the challenges and difficulties. Sometimes consumer involvement can be presented as a panacea as if it all runs smoothly – but when people talked about the difficulties, that was one of the most helpful parts of the day...because you could think I might come across that – and how did that person deal with it... ”

In this context, the **facilitators** commented on the importance of not seeming to be critical of the researchers and of respecting the skills and knowledge that the participants brought to the class:

“ These were [the participants] highly successful academics who had done well to get where they were there...so we had to enable them to be open and to explore things that are difficult... in a way that built up their confidence... ”

### **Careful planning and preparation**

The **participants** commented that it was noticeable that the Masterclasses had been planned carefully and the facilitators were well-prepared:

“ They [the Masterclasses] were very well run – that was noticeable about them – carefully thought through... ”

“ The presentation was neat and precise and something you could replicate elsewhere – so it was clear it had been well-thought through from the start. ”

### **The endorsement of COMPASS**

One **participant** commented:

“ People had heard of COMPASS and what the organisation does – so that helped them to understand the training was coming from a reliable source. If I had gone off and got training from an organisation they didn’t know or were apprehensive about – it would have created a greater sense of risk about the venture. ”

From the perspective of the **facilitators**, one of the most important elements of the Masterclass was that it enabled the participants to work on the issues they were grappling with at the time:

“ The format was interactive and responsive to the issues people brought - it wasn’t a top down lecture... it helped people to see it for themselves in their own particular situation for their own research... that kind of experiential learning stays for longer. ”

A key factor that helped the **facilitators** to run the classes successfully was the support from their colleagues in COMPASS:

“ We could not have done any of it without the support of COMPASS core group and the high quality admin support. ”

“ The fact that the COMPASS Board supported and funded the running of those classes showed that the Board saw it [consumer involvement] as important and something worth doing... and it encouraged people to come. ”

“ Practical support is very important. We had COMPASS administrators who handled the organisation and recruitment to the classes – which took the burden off the facilitators. It was also helpful to have that support from someone who gets it [consumer involvement]. That’s important. ”

## **5.2 How could the Masterclasses have been improved?**

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The interviewees identified a number of ways

in which the Masterclasses could have been improved. These included:

- Covering additional topics
- Creating and maintaining more formal links between participants
- Working with teams
- Providing written course materials

These will now be discussed in turn.

### **Covering additional topics**

Inevitably as the Masterclass participants were divided into small groups, and each group focused on a single topic, no one was able to discuss every issue in depth. In addition, the participants have since come across new issues and challenges that they realise they would like help with. They therefore suggested additional topics for future classes including:

- How to recruit a representative group of service users
- How to recruit new members to a service user panel
- What training and support is needed to develop service users in their role
- Paying people for involvement

### **Creating and maintaining more formal links between participants**

Many of the **participants** thought they would get in touch with others from their class if they wanted more help in future:

*“ I wouldn’t think twice about getting in contact with some of the people who were there to ask them for their advice if I did encounter a problem – it’s given me a different kind of support network – the people who were there would be a good sounding board. ”*

However, there was a concern that participants

might not do this in years to come if they had not managed to keep in touch. This led to suggestions of creating and maintaining more formal links between participants, including making links across different classes. There were several suggestions as to how this might be achieved including:

- Bringing the participants back together to discuss their experiences, share new ideas and to think about what else they might do differently. In effect, the group could become an action learning set, perhaps meeting less often and continuing their discussions using social media.
- Creating a database of alumni including all the participants from every Masterclass. This could create a consumer involvement community and for example could help researchers find others with an interest in consumer involvement when they move jobs.
- Distributing a flyer or newsletter with regular updates as a means of maintaining communication across all the class members.
- Having an on-line network of course participants who ‘you could bounce ideas off and share things with’.

There was also a suggestion to create links between the service user networks known to each of the **participants**:

*“ Those researchers will all have a network of people that they work with and that they have involved in research, who might be people outside of my area of interest, but sometimes that would add a different perspective – for example they might be able to look at issues common across other long term conditions... We’re all access points to our own networks of people – but we might be able to share those. ”*

It was thought this approach might help researchers find service users to work with much more quickly:

*“ If I was struggling to find people or to find time to do all the ground work to develop relationships with service user organisations – other researchers may already have those relationships and by speaking to them, I might be able to speak with a lot of different service users. This could also create a larger voice for service users if they were connected up as well – rather than being siloed... ”*

*“ When responding to a tender that has incredibly short timescales – the people you can contact quickly might not be the people you need to speak to about that tender – if you had that network they might be able to connect with people really quickly who are the right people to support the development of the work you’re doing. ”*

### **Working with teams**

Some of the participants attended the Masterclass with their colleagues from the same department, including senior researchers. The facilitators had some prior concerns about whether this would prevent people from being open about any difficulties they were facing. However, this was not observed in any of the classes, nor did any of the participants report this as a problem.

One of the **participants** thought that the presence of senior researchers in the training would send an important message to others:

*“ Senior researchers need to be there to demonstrate their support for consumer involvement. They need to be seen to be promoting it and to suggest that their staff attend... If senior people aren’t there, it suggests they don’t think it is important, that they think they have nothing to learn... they will also miss out from not hearing the issues being experienced by their junior staff. ”*

There was also a suggestion that the Masterclass could be developed specifically to support research teams, as one of the **participants** commented:

*“ A team of researchers could come together to improve what they’re doing – they could talk about a particular project and discuss how they are involving service users in different dimensions of that project. That would also take away the focus on an individual not knowing how to do something... ”*

One of the **participants** also reported that another member of their class had described feeling unsupported in their team, which was making consumer involvement more difficult. The interviewee was concerned that after the Masterclass there didn’t seem to be a mechanism to provide follow-up for that individual, or for her colleagues. Working with teams might be able to address this kind of challenge.

### **Providing written course materials**

There were a number of suggestions for developing written materials from the Masterclass including:

- Producing a shorter version of the presentation materials that participants could use at workshops and conferences
- Producing a set of materials that could be made available to senior researchers to be used to teach masters students

If such a resource were produced it would need to be explicit about the need for service user facilitators to deliver (or co-deliver) the class as this proved to be an essential feature for its success (See Section 5.1) and for it to maintain the interactive and self-directed approach.

# 6. Lessons about training in consumer involvement

This section considers some of the general lessons that have emerged from this evaluation that may be useful to the future development of training in consumer involvement for researchers. The key questions considered are:

- Who benefits from training in consumer involvement in research?
- What kind of training is most useful?
- Who is best equipped to provide this training?
- How can researchers be encouraged to attend consumer involvement training?

These questions will be addressed in turn.

## 6.1 Who benefits from training in consumer involvement in research?

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Researchers at all levels benefit from this training. A number of the **participants**, including a senior researcher, commented on the importance of providing this training to senior researchers:

*“ There are generational changes. These consumer involvement policy initiatives seem quite new. So entry level researchers who are committed to it and want to facilitate it... may not be able to get the support they need from their seniors – because it wasn’t as important at the time when they were jobbing researchers. ”*

*“ Speaking as a senior researcher, if you’re running a study you need to understand all the elements individually... so you need to understand the principles of consumer involvement so you can be a useful mentor to others in your team. And if you’re teaching new researchers and you need to*

*teach them how to do it – you have to have an understanding of how to do it yourself. ”*

In conclusion, it seems that the participation of senior researchers is particularly important because:

- Consumer involvement is relatively new and this training may not have been available to them earlier in their career
- It sends an important message to others that consumer involvement is valuable and worthwhile
- It encourages junior researchers to attend the training
- Senior researchers need to understand consumer involvement to be able to mentor their junior staff effectively
- Senior researchers may benefit from hearing about the challenges and difficulties their staff are facing

## 6.2 What kind of training is most useful to researchers?

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### ***Training needs to take the form of continual professional development***

Researchers need more than a single training event to develop their knowledge and skills in consumer involvement. Training (and support – see below) needs to be ongoing to enable researchers to improve their practice over time and find solutions to newly-emerging problems.

### ***Different kinds of researchers need different kinds of training***

The type of training that will be most relevant will also depend on the skills and competencies

of the individual. Certain types of researcher, in particular qualitative researchers, may be better equipped for consumer involvement because they already have skills, for example, in facilitating group discussions. However most quantitative researchers may not have had any experience of this kind and would therefore benefit from additional training.

The skills that **participants** considered to be fundamental to effective involvement included:

- Communication skills – how to structure a group discussion, how to probe, how to redirect, how to open a discussion, how to close a discussion.
- Facilitation skills – how to enable all group members to contribute and how to support discussions in a way that participants feel a sense of ownership of the process.
- How to chair a meeting – in particular how to chair meetings with a mix of professionals and service users in a way that enables the service users to make a meaningful contribution.
- Community development skills
- Action research skills

It can be a challenge for researchers to successfully involve service users if they haven't these skills, making this kind of training essential as one **participant** commented:

*“ Some people don't have any of the relevant experience to enable people's participation throughout their disease trajectory – that's asking quite a lot from researchers. It's not written into any of our job descriptions either. ”*

However, it was also recognised that some individuals within a research team will be better suited to carrying out consumer involvement than others. Therefore this kind of skill development

is only needed by the people with direct responsibility for involvement:

*“ Different team members have different strengths. Some people are more comfortable doing the thinking work and not so comfortable working with people – so we need to develop the people who need to be equipped to do this sort of work. ”*

### **Ongoing support to help put learning into practice**

A number of the **participants** commented that they would have liked to have had more practical details included in the Masterclass:

*“ What I would like to hear are some concrete plans and examples of what researchers have actually done and how it influenced projects – what went well and what went wrong as well. ”*

*“ A lot was about the principles and philosophy. There was a bit of how to do it – but not in-depth. ”*

*“ I still don't know exactly what works well... Should I invite ten people or fifty people or just one person? And how do you connect with them and keep in touch? What's efficient? What works well for them as well – not just for researchers – service users are busy people as well. ”*

However, one of the challenges in developing any training programme or guidance on consumer involvement is that it is difficult to be prescriptive. The way in which consumer involvement needs to develop within any research project, programme or institution critically depends on the precise context. It depends on the nature of the research, the skills and knowledge of the individuals involved and the perceived purpose of the involvement. This means in the context of training a mixed group of researchers it may only be possible to offer general principles and pointers to good practice.

Providing researchers with some form of on-going support can provide a valuable means of helping training participants to put their learning into practice. This could be provided by people with expertise in consumer involvement (e.g. support staff in research departments) or by creating more formal and informal networks between researchers and service users (see Section 5.2).

### 6.3 Who is best equipped to provide this training?

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Involving service users in the delivery of consumer involvement training is extremely effective, because the facilitators then model the behaviour they are aiming to encourage. From the **participants'** point of view this was crucial to the success of the Masterclasses (see also Section 5.1):

*“ It was essential to have service users as trainers because you believe them... because they know what it's like to be involved. It's about 'how to involve us'... It was good to have researchers there as well... but users doing the presentation was really important. ”*

As with all consumer involvement roles, the skills and competencies of those individual service users were also a critical factor contributing to their success. Both service users had extensive experience of training adults and adult education and of being involved in research. They are also active in the wider field of consumer involvement. This meant they were able to be both convincing and supportive, they were aware of other sources of advice and support, and were familiar with the current debates around best practice.

In delivering and developing training (as with all types of involvement), it is therefore essential to select the right people for the job. As some of the **participants** commented:

*“ I knew of the reputation of the trainers, that*

*they were really forward thinking and I knew from the COMPASS web site that they had already done some interesting projects. Personally I thought I could learn a lot from them... ”*

*“ These were experienced consumers, so they do understand the kinds of difficulties that we as researchers face – this is why I was attracted to the Masterclass. ”*

### 6.4 How can researchers be encouraged to attend consumer involvement training?

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From the perspective of the facilitators, the endorsement of the training by senior COMPASS Board members seemed to boost attendance in some of the classes. With hindsight, the core group believes they might have encouraged greater numbers of participants by taking a more proactive approach to obtaining this senior level support, as one of the **facilitators** commented:

*“ If we had gone to visit Board members face-to-face and said this consumer involvement training is important, consumer involvement is part of the COMPASS philosophy... it's in your strategy and part of your deliverables... then we might have encouraged them to be more top down in encouraging researchers to attend... ”*

There also seems to be critical times for researchers when training in consumer involvement is particularly useful (see Section 4.1). Researchers might therefore be encouraged to attend this kind of training if it is directly linked to their interests or is seen to be a way of helping them overcome any problems they have in their research.

Given that different kinds of researcher will want different kinds of training (see Section 6.2), it is

essential that the target audience is clear about what any training will offer and who is likely to benefit from attending. The fact that this training was described as a 'Masterclass' may have signalled that this training was only suitable for researchers with some prior knowledge or experience.

# 7. Recommendations

## Recommendation 1

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Training in consumer involvement should be planned and scheduled to fit with key stages of researchers' careers and/or the research cycle e.g.

- Funders should provide this training prior to calls for proposals or in parallel with the annual grant cycle
- Research departments/universities should provide this training as part of an induction package
- Attending this training should be linked to promotion e.g. it should become a pre-requisite for a senior fellowship or programme grant.

## Recommendation 2

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A broad range of training in consumer involvement should be made available including:

- Introductory courses for researchers who are completely new to involvement
- Advanced training, using models similar to that of the Masterclass, for researchers who want to improve their practice
- Topic specific workshops to help some researchers overcome practical barriers e.g. paying service users, recruiting to panels etc
- Training to develop the core skills and competencies required to effectively involve service users: e.g. facilitation and chairing skills.

## Recommendation 3

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Senior researchers should be encouraged to

attend training in consumer involvement. The training should also be championed by senior staff to motivate and encourage others to attend.

## Recommendation 4

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Ongoing support for researchers should be provided either by consumer involvement support staff within organisations, and/or by developing mechanisms to maintain momentum and facilitate shared learning.

## Recommendation 5

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Training should be delivered (or co-delivered) by experienced service users with training and facilitation skills. More thought needs to be given as to how to identify suitable candidates and how to develop their professional skills and experience.

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TwoCan Associates

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