Stretch2Engage evaluation toolkit

Service engagement capacity wheel

This document provides a tool—the capacity wheel—for reviewing aspects of organisational engagement capacity from the perspective of an individual staff member right through to a broader organisational lens. The template forms part of the Stretch2Engage Evaluation Toolkit, which supports organisations to evaluate engagement initiatives.

The tool was developed by Lirata Consulting during the Evaluation of the Stretch2Engage Framework Pilot in 2019. The evaluation was commissioned by Queensland Mental Health Commission (QMHC) and was undertaken in partnership with Queensland Network of Alcohol and Other Drug Agencies, Queensland Alliance for Mental Health and Enlightened Consultants.

The Stretch2Engage Framework

Stretch2Engage is a contemporary set of best practice principles to guide the engagement of people using mental health (MH) and alcohol and other drugs (AOD) services, and their friends, families and supporters, in designing and re-designing services. Stretch2Engage acknowledges engagement as a human right fundamental to citizenship, as well as highlighting the benefits to services that engage effectively.

The Stretch2Engage Framework outlines principles and processes that organisations can adopt to offer more contemporary, inclusive and comprehensive engagement practice in direct service settings. Stretch2Engage's focus is not on therapeutic engagement, but on engagement in service design, improvement and evaluation.

Evaluation toolkit

Meaningful engagement asks organisations to think and act differently, which requires a significant investment of resources. It is important that organisations monitor and evaluate the progress of their service engagement initiatives to:

- understand their engagement capacity and how it changes over time
- identify whether new engagement approaches are having positive outcomes
- learn from the engagement processes that are tested, and identify how to strengthen them in future.

The Stretch2Engage evaluation toolkit is a collection of resources that helps organisations to monitor and evaluate service engagement initiatives. The toolkit includes:

- **a brief guide to monitoring and evaluation of service engagement initiatives**
- **Stretch2Engage Theory of Change**
- **organisational survey template**
- **a brief staff survey template**
- **service engagement capacity wheel template and instructions**
- **significant change story template and instructions.**

Queensland Mental Health Commission

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More information about the Stretch2Engage Framework and the evaluation toolkit is available at: www.qmhc.qld.gov.au/engage-enable/lived-experience-led-reform/stretch2engage.

About this template

What is engagement capacity?

Stretch2Engage places the responsibility for engagement on service providers, not on people using services, and calls on services to ask the question: 'How can my organisation more effectively engage?' This approach changes how engagement is understood, resourced and implemented, and emphasises the need for organisations to build their engagement capacity.

To effectively implement Stretch2Engage, services will need to review and re-frame key organisational cultural dimensions related to values, structures, systems, resources and practices. Enhanced engagement capacity should ultimately result in transitioning greater power and control for decision making to people using services.

Capacity has individual and organisational aspects, and both need to be considered in assessing capacity-building outcomes. Both levels of capacity are strongly connected with organisational culture.

To assess changes in engagement capacity, the Streth2Engage Framework Pilot evaluation used a capacity model that built on and extended Johnson and Scholes et al. (2011) 'Cultural Web'.[1] This capacity model considers six broad capacity domains:

1. **Stories and symbols.** The stories and symbols shared by organisations provide information about what is prioritised and valued, and what behaviours are endorsed. These

artefacts provide an important guide to what organisations believe is important.

2. **Organisational and power structures.** Organisational structure and power include both the structure defined by the organisational chart, and the unwritten lines of power and influence that indicate whose contributions are most valued. Organisational structure and power can provide a guide to who gets to make decisions and how these decisions are made. Other elements of capacity related to this theme include the way in which leadership is provided for service engagement, and the breadth or narrowness of responsibility for and involvement in service engagement processes across roles and teams within the organisation.

3. **Control systems.** Organisational control systems refer to the ways an organisation is monitored and controlled. These include explicit systems to support and guide financial, quality, compliance, and human resources functions. However, it also includes more subtle controls that exert influence by the way people are rewarded or cautioned about their behaviour and practice within an organisation. In relation to service engagement, increases in capacity could be indicated by the increased clarity, communication or sophistication of policies and processes for service engagement, clearer expectations of staff behaviour in relation to engagement, and improvements in the way that engagement policies and processes are monitored and iterated.

4. **Values and attitudes.** Values and attitudes are key elements of capacity, which have a profound effect on the ability of organisations to implement desired changes and to achieve intended outcomes. Values help guide behaviour, while attitudes tend to be an emotional or psychological response to

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[1] Johnson, G., K. Scholes, R. Whittington & S. Pyle. *Exploring strategy. Text & cases (9th ed.).* Harlow: Financial Times Prentice Hall; 2011.

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behaviour resulting from values. In this sense, values tell us what we think is right or wrong, good or bad, and attitudes are likes and dislikes of activities, experiences or people based on these values. The expressed and enacted values and attitudes of organisational staff can have a major effect on whether and how service engagement occurs.

5. **Knowledge and skills.** The development of engagement knowledge and skills is a key element of capacity, and a necessary pre-condition for pilot organisations if they are to strengthen their engagement of service users in service design decision making.

6. **Priorities and resources.** The elements an organisation prioritises and resources are a good indication of its perceived importance. Organisations that demonstrate a commitment to service user engagement are likely to highlight and fund these activities. The availability of resources is also an essential element of organisational capacity in relation to service engagement and has a major influence on the extent of activity that is able to occur in relation to that service engagement.

Purpose of this tool

The capacity wheel provides an easy-to-use visual format through which stakeholders can quickly rate selected dimensions of organisational culture and capacity for service engagement.

These ratings provide an outline of stakeholders' perceptions of an organisation's engagement capacity at a point in time. Repeated use of the tool over time can help to identify changes in perceived engagement capacity within an organisation.

Stakeholders

The tool is designed to be rated by staff or managers working within a team or organisation that is implementing service engagement initiatives.

Adapt the template

The capacity wheel template provides a starting point. You may want to develop your own version of it and adapt the dimensions to fit your context.

The capacity wheel is not specific to the Stretch2Engage Framework, but reflects the framework's emphasis on strengthening engagement capacity and culture.

Using this tool

The capacity wheel is designed to be printed and used in conversation between a facilitator and one or more participants, who will mark a rating for each of the nine dimensions of the tool on the diagram. Ratings can be gathered individually from different people, with each person completing their own copy of the tool, or the tool can be given to a group to discuss collectively and form a consensus about the most appropriate rating for each dimension.

During or following the assignment of ratings, the facilitator should ask participants about the reasons for their ratings and note these reasons separately. This discussion can provide insights about enablers and barriers for improved service engagement within the team or organisation.

The tool may be used periodically by the same individuals or groups and results compared to identify changes in engagement capacity over time. Where the tool has been used with individuals, you can aggregate the ratings to provide an overview of perceived capacity. The tool provides useful indicative information, but is not a validated instrument.

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Further information

For further information about Stretch2Engage or the evaluation toolkit, contact **Queensland Mental Health Commission:**
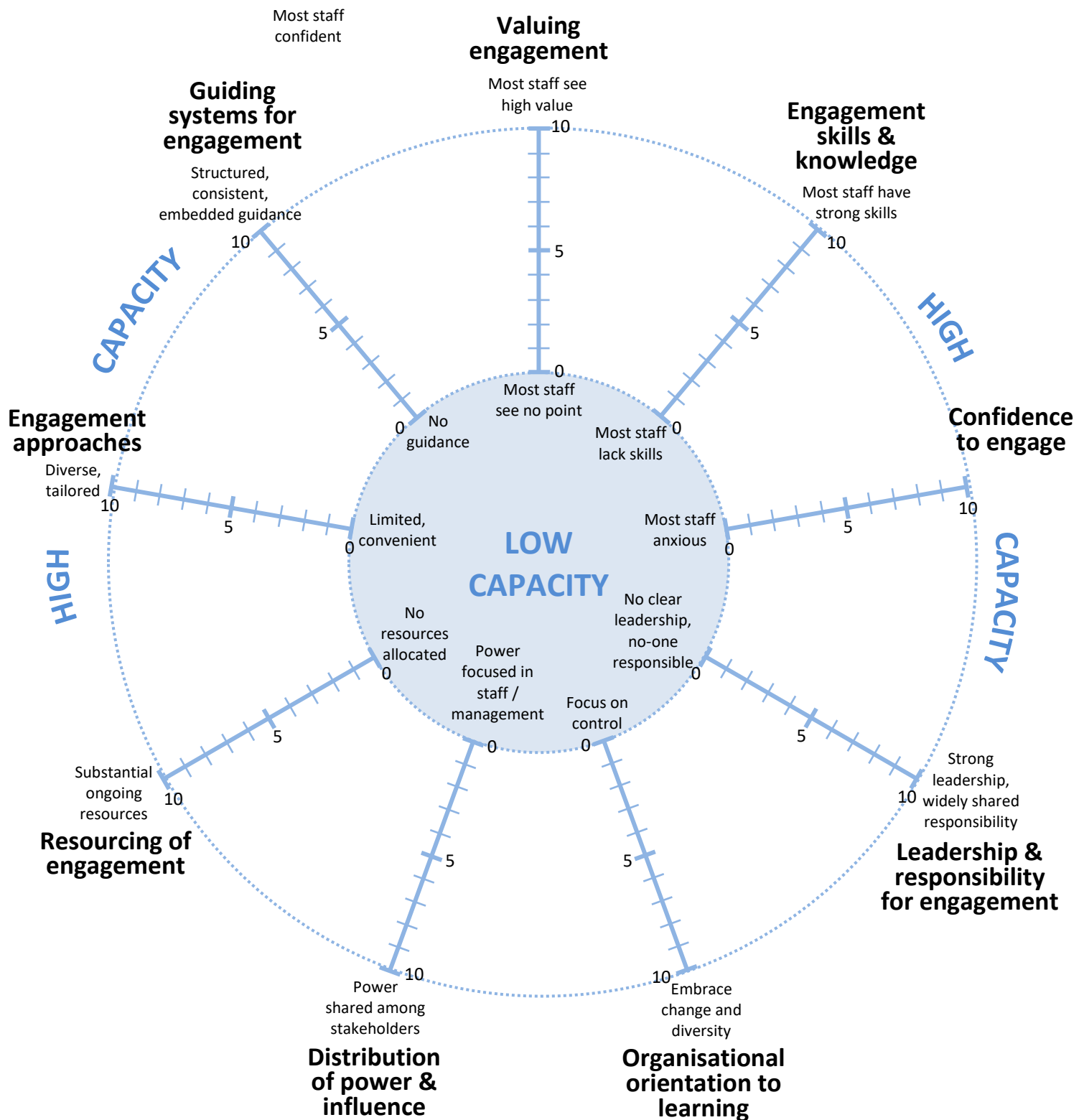
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Rate your team's or organisation's level of service engagement capacity by circling one point on each of the nine dimensions of the capacity wheel. For each dimension, 0 indicates very low capacity while 10 indicates very high capacity.

Valuing engagement
Most staff see high value
Most staff see no point

Most staff confident

Guiding systems for engagement
Structured, consistent, embedded guidance
No guidance

Engagement skills & knowledge
Most staff have strong skills
Most staff lack skills

CAPACITY

HIGH

Engagement approaches
Diverse, tailored
Limited, convenient

Confidence to engage
Most staff anxious

HIGH

CAPACITY

LOW CAPACITY

No resources allocated

Power focused in staff / management

No clear leadership, no-one responsible

Focus on control

Resourcing of engagement
Substantial ongoing resources

Leadership & responsibility for engagement
Strong leadership, widely shared responsibility

Distribution of power & influence
Power shared among stakeholders

Organisational orientation to learning
Embrace change and diversity