

Task and Finish Group Toolkit

for

Local Involvement Networks (LINKs)

Developed by Liverpool LINK Support Team



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1) Introduction

This Task and Finish Toolkit has been compiled by the Liverpool LINK Support Team with the approval of the Liverpool LINK Core Group and is based on our LINK's experiences during our first 'round' of Task and Finish Groups.

The Toolkit is necessarily quite complex, so we do not expect it to be learnt in detail prior to starting your Task and Finish. The best way to use the Toolkit is to scan through it to get a general feel for the contents and then use the relevant sections as and when you need them in the development of your work.

In 2009, our LINK's first full year of operation, we prioritised three issues submitted by members and 'scored' and ranked by our Core Group members. Each of the three issues was the subject of six months work by a Task and Finish Group, Chaired by a Core Group member and including LINK members with an interest in the subject.

The reports are:

- "Too cheap, too strong, too available" – report of Alcohol Task and Finish Group
- "Weighing Liverpool Up" – report of Healthy Weight Task and Finish Group
- "Personalisation: The Way Forward" – report of Personalisation Task and Finish group

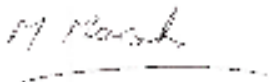
All three reports are available on the Liverpool LINK web portal www.liverpoolink.org.uk together with the responses received from the relevant commissioners for each service.

Our first three priorities for 2010 are:

- Liverpool: Healthy City? (focus on services for older people and mental health services)
- Sexual Health Services
- Disabled Wellbeing

This year's Task and Finish Group members will be attempting to learn from the experiences, successes and problems faced last year and will be using this toolkit as a guide. We hope that, with appropriate adaptations, it will also be useful to other LINKs across the country as they conduct research, write reports and make recommendations. Liverpool LINK can also provide training on running an effective Task and Finish Group – just contact us for details!

Good luck!



MIKE MARSN
Chair, Liverpool LINK

2) Task and Finish Group Membership

Once your LINK has agreed that a particular local issue or service is a big enough priority to warrant the establishment of a Task and Finish Group to look into the topic further, one of the first things you'll need to do is identify group members.

Some of the things you'll want to consider are:

- Size of Group
- Membership criteria
- Diversity
- Chairing

You might wish to add other criteria to this list.

There is not necessarily an ideal minimum or maximum size for a Task and Finish Group but, to be effective, you will need enough committed members to turn up regularly to meetings with ideas and active input but not so many that no decisions ever get made!

Remember that your LINK membership is your greatest resource so one of the first things you should do is contact members to let them know the topic the Group will be working on and the expected time commitment this might involve (for example, two meetings a month for six months with possible responsibility for note taking and report drafting). Ask them to contact you by an agreed date if they would like to become an active Group member and make sure that you invite them to attend the Group's first meeting.

Remind LINK members that if they are unable to commit the time to being an active Group member they can still contribute ideas, evidence or suggestions to the Group at any time throughout its duration. Make sure you let them know how to do this.

If your LINK has 'Associate Members' or 'Friends' in the public or private sectors you might also consider approaching them – particularly those who have experience in a relevant field – and inviting them to get involved in some capacity.

Always remember that if any member of the Task and Finish Group has, or might potentially be seen to have, a conflict of interest in relation to any aspect of the Group's work they should declare it. Some 'Friends' may not be ideal 'full' members of the Group for this reason but they can still be useful in providing information, contact details and strategic context.

Sometimes sending an open invitation to members may not be enough to attract enough individuals who are committed to the work of the Group. Another option would therefore be to actively recruit members who you know to have the skills, experience and time to contribute. Let them know how their involvement can influence service commissioning and benefit service users

and also how the experience of Task and Finish membership can be useful to them in improving their own knowledge and skills.

Another thing you should consider is how representative the Group is of your LINK membership and of the wider public. If you think the Group is not diverse enough you should take active steps to broaden its membership and to actively recruit members from under-represented groups.

Where your Group is looking at services aimed at particular communities or interest groups you will need to take steps to make sure those communities are represented in the Group membership.

In any event it is useful for a Task and Finish Group to be as diverse as possible – as health and social care services can impact on people in different ways depending on factors such as age, gender, race, faith, disability and sexual orientation, as will be discussed later in this Toolkit. Thus, the broader the perspective of your Group the more likely you are to pick up on equalities issues in the course of your work.

Your LINK may have Governance or policy relating to who is eligible to Chair a Task and Finish Group – for instance the post may only be open to Core Group or Steering Group members or those who have undertaken specific training. In other cases it may be up to the Group members to select the person they think is most appropriate to Chair the Group.

In all cases the role of Chair is crucial in co-ordinating the work of the group, staying focused on the task in hand, keeping meetings running smoothly, allowing everyone to have their say and liaising with LINK Support staff around administrative issues including agendas, meeting notes, room booking and production of reports.

THINK!

Have you

- Announced the subject of your Task and Finish Group to LINK members and the wider public?
- Invited all LINK members to join the Group?
- Provided guideline information about time commitments?
- Targeted LINK members with specific skills or knowledge?
- Sent out details of when and where the first meeting will be?
- Provided information about how to contribute to the Group in ways other than active membership?
- Invited contributions from 'Friends' or partners in other sectors?
- Thought about how diverse the Group is and how equipped to deal with the Task in hand?
- Taken steps to increase Group diversity if necessary?
- Selected an appropriate Chair?

3) Training

One of the best features of LINKs is that they bring together a broad range of individuals and organisations with different skills, knowledge and experience. Some will be familiar with Task and Finish type activities in a professional capacity; others will have a wealth of experience of collecting information in their own communities. Everyone's experience counts and is valuable to the work of the Task and Finish Group but it may help you to work together as a team if you participate in some group training.

There are several commercial training courses available for LINK members on subjects such as Task and Finish, Research Skills and Report Writing and these may be very useful to you and your members. Alternatively your LINK may run 'in house' training.

A basic training session might include the following:

TASK AND FINISH: AN INTRODUCTION

1.00 - 1.15	Welcome, housekeeping, introductions and ground rules
1.15 - 1.45	How to make a cup of tea (exercise)
1.45 - 2.15	Identifying and prioritising issues; selecting Task and Finish Group members
2.15 - 2.45	Terms of Reference, Action Planning and Monitoring
2.45 - 3.00	Break
3.00 - 3.20	Researching, Reporting and Recommending - the process
3.20 - 3.50	Task and Finish meeting (exercise)
3.50 - 4.00	Evaluation and Close

There is plenty of scope for you to develop your own ideas within this format but a couple of useful exercises to help groups understand the importance of team work, consensus and good chairing are include below.

HOW TO MAKE A CUP OF TEA - EXERCISE

Individually (5 minutes)

On the paper provided write down in order the steps you would take to make a cup of tea.

Pair up with a colleague (5 minutes)

Share the steps that you have written down and together negotiate a new list containing steps that you can both agree on.

Remember to respect your partner's original list and ask questions regarding their order of events. Anything that drops off the list must be by mutual agreement.

Groups of 4 (10 minutes)

Share the steps that you have written down and together negotiate a new list containing steps that you can all agree on.

Remember to respect your partners' original list and ask questions regarding their order of events. Anything that drops off the list must be by mutual agreement.

Whole Group (10 minutes)

Share the steps that you have written down and together negotiate a final list containing steps that you all agree on.

Remember to respect your partners' original list and ask questions regarding their order of events. Anything that drops off the list must be by mutual agreement.

What does this exercise teach us?

On completion of the exercise ask participants what they think the purpose was. If necessary prompt them with words or phrases such as 'team work', 'negotiation', 'consensus building' or 'co-operation' and offer them the opportunity to add any other thoughts of their own.

TASK AND FINISH MEETING SCENARIO - EXERCISE

You are members of a Task and Finish Group looking at local Mental Health services. You are starting work on an Action Plan for your group.

Each member of the group will be allocated a 'secret role' by the training facilitator (see below). Select a Chair and try to conduct the meeting in your 'role', working through the agenda below.

You have 20 minutes to complete this exercise with 10 minutes for feedback and discussion.

AGENDA

1. Key partners to work with
2. What evidence to look for
2. Prioritising work and setting targets

Please nominate a member of your group to provide feedback about your planning process.

What does this exercise teach us?

On completion of the exercise ask participants what issues the experience raised for them. If necessary prompt them with words or phrases such as 'effective chairing', 'appropriate conduct', 'declarations of interest' or 'being inclusive' and offer them the opportunity to add any other thoughts of their own.

Remember, the dynamics of the exercise might change considerably depending on which 'secret role' the Chair has been allocated.

<p>ROLE DESCRIPTIONS for the above exercise</p> <p>You are a Shy Person You have lots of ideas and want to get involved, but you lack confidence. You think you are too inexperienced to contribute on anything until you are encouraged by somebody. You start off trying to contribute but when people look at you, you tend to stop talking.</p>
<p>You are an Obstructive Person You are self opinionated. You are keen to have your say and do so regularly. You don't have respect for other people's opinions, you don't see the need for agendas and you hate sticking to them.</p>
<p>You are a 'Yes' Person You agree with everyone and let them know but you don't have any original ideas of your own. You support the need for the agenda as you are a process minded person who likes to stick to the business. You tend to waffle a lot.</p>
<p>You are a 'Know it all' You have done and seen everything before and you are keen to let people know about your experience and to show them that they don't know as much as you. You continuously name drop and quote percentages and facts to prove people wrong.</p>
<p>You are a supportive person You support, care for and respect all people involved and encourage everyone else to do the same. You dislike individuals being excluded from discussion and will stick up for them. You are quite vocal in defending people particularly against obstructive people.</p>
<p>You are a person with you own agenda You are set against working in partnership with anybody and you like to have your say. Though you don't say it out loud, your organisation is the most important thing to you and you want the research to reflect well on them and badly on others.</p>

Even if you decide that you do not need any specific training as a group, this Toolkit should provide some basic guidelines to help you through the Task and Finish process.

<p>THINK!</p> <p>Have you:</p> <ul style="list-style-type: none"> • Talked to Group members about whether they'd like some training? • Discussed whether 'in house' or external training would be appropriate?

4) Terms of Reference

Having recruited members to your Task and Finish Group your first meeting should concentrate on agreeing Terms of Reference and drawing up an Action Plan.

The next section covers Action Planning but before you get to that stage you'll need to agree on what you Group has been set up to do.

This will help Group members to stay focused on their Task and will also help you to explain what you are working on to other people – particularly those who you would like to contribute information to your report.

Terms of Reference can be as long or as short as your Group thinks appropriate but they may contain some of the following:

TASK AND FINISH GROUP, GENERAL TERMS OF REFERENCE

Purpose of group

- To consider Issue X
- To develop recommendations for addressing Issue X, which will contribute towards improving the commissioning, delivery and/or monitoring of services in the short and longer term
- To carry out its work in a transparent, inclusive and timely manner
- To seek to represent the range of views relevant to the issue under consideration and to solicit and take account of feedback from the public
- To consider equality and diversity issues in relation to the issues under consideration and any impact current services or future recommendations may have on equalities groups

Membership

The Task and Finish group will be Chaired by a Core Group member and may include LINK members and 'Friends of the LINK' who have an interest in the topic under consideration.

Sub groups and advisors may be appointed if necessary and their terms of reference will be agreed by the Task and Finish group.

Frequency of Meetings

The group will agree the frequency and intervals of its meetings in order to achieve its purpose and specific duties within the timescale agreed by the Core Group. It is likely that the group will need to meet at least once a month and that group members may, from time to time, also be required to attend external meetings in connection with the group's theme.

Specific duties (*these will be relevant to each Task and Finish Group and will be determined by the Group in the light of the agreed aim and advice of the Core Group*)

For example, these might include:

- To identify existing and potential partners and related initiatives which may contribute to a robust report
- To identify desired outcomes amongst identified partner groups in relation to future services, public involvement and partnership working
- To identify opportunities presented by existing and future initiatives which will assist in achieving desired outcomes
- To identify weaknesses in aspects of current partnerships or services and ways of addressing these
- To identify processes and procedures to support the consultation process and to support long term involvement and engagement of the public in service commissioning and delivery
- To present a range of recommendations for consideration by the LINK Core Group, the Senior Commissioner for Service X, the relevant Overview and Scrutiny Committee and other partners by a specified date.

Budgetary responsibility

No budget is assigned to the Task and Finish group

Communication by the Group

The group shall be responsible for keeping the public, the Core Group and LINK members informed of progress by the following mechanisms:

- LINK website
- Reports at Core Group meetings
- Interim report
- Other appropriate means identified by the Task and Finish Group, including public meetings, media and health and social care partners.

Notes of each Task and Finish group meeting will be produced within 7 working days and forwarded to the LINK Support Team for placing on the LINK website within 14 working days following each meeting.

Limits of Authority

The Task and Finish group will be responsible only for reporting and formulating recommendations on agreed and identified issues.

Recommendations of the Task and Finish group will be discussed and endorsed by the Core Group before presentation to Commissioners, Overview and Scrutiny Committee, other interested partners, the LINK membership and the wider public.

THINK!

Have you

- Agreed Terms of Reference that are suitable to the work of your task and Finish Group?
- Do all Group members know the purpose of the Group and are they able to explain it to others?

5) Action Planning

Getting a Task and Finish Group up and running can be a daunting task so another important early exercise for Group members is to devise an Action Plan.

An Action Plan should help you to focus on your Group's goals and what you need to do to achieve them by breaking the process down into manageable chunks. It should set out who is responsible for doing what by when and should also allow you or your LINK Core Group to monitor your progress, review your findings and develop contingency plans if things do not go as you originally anticipate.

A common reason for Action Plans to fail is that the objectives they set are too complex, unrealistic or unachievable. So make sure you set your Group goals that you have a real chance of achieving whilst, on the other hand, ensuring there is enough of a challenge to be worthy of a Task and Finish enquiry!

You might want to consider using SMART Objectives to help you do this.

10 STEPS TO SMART OBJECTIVES

1. Sort out the difference between **objectives** and **aims, goals and/or targets** before you start.
 - Aims and goals relate to your aspirations
 - Objectives are your 'battle-plan'

Set as many objectives as you need for success
2. **SMART** stands for **S**pecific, **M**easurable, **A**chievable, **R**ealistic and **T**imely.
3. Often, it can be useful to look at the letters in a different order - e.g. M.A.R.S.T.
4. **Measurable** is the most important consideration. You will only know that you've achieved your objective, because there is evidence. Make sure you state how you will record your success.
5. **Achievable** is linked to measurable. Usually, there's no point in starting a job you know you can't finish, or one where you can't tell if/when you've finished it. You decide it's achievable if:
 - you know it's measurable
 - others have done it successfully (before you, or somewhere else)
 - it's theoretically possible (i.e. clearly not 'not achievable')
 - you have the necessary resources or a realistic chance of getting them
 - you've assessed the limitations.
6. If it's achievable, it may not be realistic. If it isn't realistic, it's not achievable.

You need to know:

- Who's going to do it?
- Do they have (or can they get) the skills to do a good job?
- Where's the money coming from?
- Who carries the can?

7. **Realistic** is about human resources / time / money / opportunity.
The main reason it's achievable but not realistic is that it's not a high priority. Often something else needs to be done first, before you'll succeed. If so, set your objectives in priority order.
8. **Specific** is all about the detail. You will know your objective is specific enough if:
 - Everyone who's involved knows that it includes them specifically
 - Everyone involved can understand it
 - Your objective is free from jargon
 - You've defined all your terms
 - You've used only appropriate language.
9. **Timely** means setting deadlines. You must include at least one; otherwise your objective isn't measurable. But your deadlines must be realistic, or the task isn't achievable. T must be M, R and S - without these your objective can't be A!
10. It is worth the effort! Using the SMART formula you'll know you've done your job well, and so will others.

Overleaf is a blank Action Plan template which might give you a starting point to adapt or amend. It's up to you to populate your plan in ways which are suitable to your own Group's work and to set yourself realistic milestones and measurable targets or outcomes.

Remember, a good Action Plan should be a useful tool not a burden! It will also act as a kind of audit trail so that your Group can be accountable to LINK members and others for the work it is doing.

THINK!

Have you:

- Thought about how to break down your Task into smaller chunks?
- Set yourself realistic goals and timeframes?
- Used SMART objectives?
- Delegated tasks to Group members?
- Established a framework for monitoring and review?

LINK Task and Finish Action Plan - Cover Sheet

Green ✓ = On target for completion and predicted to remain on target. **Not requiring remedial action.** Standard monitoring advised

Amber ✓ = Possible slippage from target date for completion. **Possibly requiring remedial action.** Some extra monitoring advised

Red ✓ = Actual slippage or predicted slippage from target for completion. **Requiring remedial action.** Extra monitoring required

Originally Produced by: _____ **Date of original production:** _____

Current Review Date: _____ **Next Review Date:** _____ **Target end date:** _____

TFG Chair Review Comments:

TFG Chair signature:

Aims/Issues:		Outcomes:		Monitoring Methods		Expected Impact:	
Objectives	Milestones	Milestone Completion Date	Action	By Who	By When	Completed (Yes/No/Partial)	Monitored By

6) The Role of LINK Support Staff

Your Task and Finish Group membership should consist of LINK members, 'Friends' or 'Associates' and others who you might wish to invite or co-opt onto the Group on account of their knowledge.

It is crucial that LINK members themselves are the driving force within Task and Finish Groups in order to maintain independence and credibility as a non-partisan network. However, this does not mean that you will be entirely without support. You should, in particular, be able to call upon the assistance of staff within your LINK's Host Organisation in a number of ways.

All LINKs have their own set-ups and models and the role of support staff may vary so it will be useful for your Task and Finish Chair to clarify the level of support your Group can expect from your support team.

Some ways in which your support staff may be able to help include:

- Help with administration (including room booking, note taking, agenda distribution, sending out notice of meetings, arranging venues and publicity for neighbourhood meetings etc)
- Information and guidance regarding relevant contacts, useful external events and meetings, local and national strategy and relevant LINK governance
- Help with structuring your report and linking your recommendations to your findings
- Moral support

But remember – it is up to **you** as LINK members to:

- Prioritise Task and Finish topics within your work plan, based on public input
- Set the direction of your Group
- Take responsibility for the work of the Group
- Oversee the drafting and final production of your report
- Make recommendations based on your findings
- Have 'ownership' of your report

Don't expect support staff to do all this for you!

THINK!

Have you:

- Established the level of support you can expect from your LINK Host?
- Utilised this support appropriately?
- Made sure that your Group has ownership of its own work?

7) Format for Meetings

Task and Finish Groups tend to work most effectively when there is a regular format to their meetings. This format does not have to be set in stone and should be flexible enough to adapt to different topics and the differing needs and expectations of participants; however it is useful to the Chair and to other Group members if there is an agreed agenda and regular agenda items. This helps to keep the meeting on track and to maintain the focus of the group on the task in hand and agreed milestones on the Action Plan.

Task and Finish Groups should be more than just 'talking shops'. Remember that you've been given a task and your object is to finish it to the best of your abilities – not to discuss it endlessly! However, when you do have discussions it's important for the Chair to facilitate proceedings and to allow everyone to have an input whilst always observing any protocol your LINK may have regarding members' Code of Conduct.

It might help your Chair if they have some sort of a role description to refer to. A fairly comprehensive example is included here which you could use as a basis for developing something appropriate to your own Task and Finish Group:

<p>LINK TASK AND FINISH GROUP (TFG) CHAIR - VOLUNTEER ROLE DESCRIPTION</p> <p>Method of Selection</p> <p>LINK Task and Finish Chairs are selected by a majority vote of the LINK Core Group from within its own membership.</p> <p>Term of office for the role and arrangements for termination of the role:</p> <p>The term of office for the role of LINK Task and Finish Chair will normally last until the particular task that the group has been set up to work on is completed to the satisfaction of the Core Group or until the Core Group decides to dissolve the group.</p> <p>The term of office for the role of LINK Task and Finish Chair can also be ended in the following ways:</p> <ul style="list-style-type: none">• By written confirmation of a vote of no confidence by the LINK Core Group• By disciplinary action being implemented under LINK Governance• By the LINK Task and Finish Chair giving one month notice to the Core Group of their intention to terminate their role <p>Responsible to: LINK Core Group</p> <p>Role of LINK Task and Finish Chair</p> <p>To cooperate with LINK Support Team to ensure the following</p>
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Specific Elements of the TFG Chair role:

- To establish an effective TFG consisting of LINK members partner organisations and individuals to implement relevant action plans.
- To identify Specific, Measurable, Achievable, Realistic and Timely (SMART), aims and objectives for any issue prioritised for work and assigned to the TFG Chair by LINK Core Group.
- To inform the LINK Core Group of the SMART aims and objectives identified and if other SMART options for action were identified but not taken, supply a brief written justification for those that were.
- To report to the Core Group, any SMART aims and objectives that were identified relating to the issue assigned to the TFG Chair but not taken up and to make recommendations as to what to do concerning these e.g. Set up another Task and Finish Group or consult on them for possible inclusion in future Work Planning.
- To produce a detailed action plan which sets out objectives, milestones, actions, timescales, and persons responsible for implementation of any issue prioritised and assigned to the TFG Chair by LINK Core Group.
- To monitor and report progress to the Core Group on an agreed basis.
- To ensure that any research undertaken is consistent with and does not fall below the standard and research methodologies advocated during Task and Finish Training.
- To ensure that any report produced is consistent with and does not fall below the standard and research methodologies advocated during Task and Finish Training.
- To ensure that the task given by the Core Group is completed to an agreed schedule.
- To ensure that the TFG refrains from undertaking any Task and Finish activities that are not sanctioned by the Core Group and or Governance.
- To undertake further tasks pertaining to their role when instructed to do so by the LINK Core Group.

General elements of the TFG Chair Role:

- To bring impartiality and objectivity to decision-making of the TFG
- To ensure the TFG applies its resources exclusively in pursuance of its designated task
- To impartially participate in and facilitate the efficient running of meetings of the TFG
- To ensure that all TFG meetings are carried out in accordance with relevant policies and procedures of the LINK e.g. Code of Conduct and Equality and Diversity Policy
- To ensure that meetings are carried out in accordance with the aims, objectives and values of the LINK
- To ensure that the proper paperwork and information is produced and circulated in time for meetings
- To safeguard the good name and values of the LINK
- In addition to the above duties, the Chair should use any specific skills, knowledge or experience they have to help the TFG reach sound decisions. This may involve: scrutinising TFG research papers, leading discussions, focusing on key issues, providing guidance on issues in which the Chair has special expertise.

Chair Role regarding running the TFG

- To plan the cycle of TFG meetings
- To Chair and facilitate TFG meetings
- To give direction to TFG meetings
- To ensure that there is a quorum before a TFG meeting takes place
- To ensure proper agendas containing details of venue and time plus items to be discussed at meetings are produced and circulated in good time prior to TFG participants meeting
- To ensure that notes of TFG meetings are kept and distributed to participants in good time, which include: date, time and venue of the meeting, any apologies, a record of those attending, matters discussed and decisions made; date, time and venue for next meeting
- To cast the deciding vote on decisions where the other TFG if members votes are tied
- To monitor that any decisions taken at TFG meetings are implemented
- To represent the TFG at Core Group meetings

Chair Role regarding TFG Equality and Diversity

- To ensure that meetings are held in a safe and accessible venue
- To ensure that information formats used in the meeting are accessible to all participants
- To ensure that the atmosphere in which meetings are conducted is one of mutual respect and is equitable, inclusive and safe
- To impartially ensure that all participants feel safe and supported enough to participate, be involved and voice their opinions at meetings effectively
- To participate in any training relevant to the role that is deemed requisite
- To ensure that any TFG research and reports produced, take account of the equality impact it may have

Training Opportunities

- LINK Task and Finish Induction sessions will be provided for all TFG Chairs.
- All TFG Chairs will be offered access to further LINK training or relevant external training, seminars, workshops or courses as required / where deemed necessary and appropriate to LINK resources.

Conditions and Expectations

- TFG Chairs are required to work within the guidelines of this description and to comply with the conditions of LINK Governance, Code of Conduct, Policies and Procedures
- Reasonable out of pocket expenses (e.g. travel to and from authorised meetings) will be reimbursed by the LINK on production of receipts, tickets etc in line with the LINK's expenses policy

- A Criminal Records Bureau (CRB) check **may** be a requirement of role in certain circumstances
- The work of TFG Chairs is covered by the Host Organisation's insurance policies
- TFG Chairs are required to attend Task and Finish induction training sessions and may be required to attend other training as necessary

The TFG Vice-Chair

Where a TFG decides to appoint a Vice-Chair s/he is to act for the Chair when the Chair is not available and undertakes assignments at the request of the Chair.

The TFG Vice-Chair is subject to all of the conditions specified in this role description when standing in for the TFG Chair until such time as the TFG Chair returns to their role.

Failure to comply with the specifications of this role description without providing sufficient reason will be deemed to be in breach of LINK Governance and may result in disciplinary action by the Core Group and may also result in removal from this role.

Date produced: _____

Of course you'll need to meet regularly to swap information, discuss progress against your Action Plan, set new actions, gather evidence from 'experts' and think about how what you have learned can be included within your Group's report as background information or how it can influence your recommendations. But only meet if there is a purpose to the meeting and if it will help you to progress towards your goal.

It's important to send out meeting agendas in advance wherever possible – together with any supporting documents which are due to be discussed at the meeting. This will allow Group members time to prepare for discussions and to make any comments or suggestions. Of course it may not always be possible to do this, particularly if meetings are close together or called at short notice but it's a good idea to get into a regular routine of writing up notes and sending them out as promptly as possible.

A standard agenda might look something like this:

LINK Task and Finish Agenda

1. Welcome, introductions and apologies
2. Group's remit and summary of work to date (particularly if new group members or 'external' speakers / guests are in attendance)
3. Review of notes and actions from previous meeting (if applicable)
4. Review of latest draft of Group's report or interim report (if applicable)
5. Input from guest speakers (if applicable) - this may be a formal presentation followed by questions from Group members or an informal discussion allowing Group

members to ask questions and to find out about the work or relevant experience of the invited guests

6. Recommendations for report
7. Actions for Group members before next meeting
8. Any other business
9. Date, time, venue of next meeting

It may not be necessary to take formal minutes of meetings – although you can if you think it would be useful! – but it's essential that someone is appointed as a note-taker to record key points raised in discussions, important information gained from 'expert' guests, actions to be taken, recommendations to include in the Group's final report and so on. This note taker could be a member of the Group or a member of your LINK Support Team from your Host organisation.

A set of notes might look something like this:

Task and Finish Feedback Report

Participants Ernie Smith (Chair), Mildred Richards, Abdi Hassan - LINK members; Christine Aldridge - PCT Community Food Worker **Apologies:** Jackie Patton

Meeting attended Healthy Weight Task and Finish Group

Date of meeting attended 30/11/09

Main Areas of Discussion

- Guest speaker - Christine Aldridge, PCT Community Food Worker
- Actions from last meeting - report back
- Finalising report - what still needs to be done?
- Any Other Business

1.0 Welcome and Apologies

1.1 **Ernie** opened the meeting and gave apologies from **Jackie**. All introduced themselves and welcomed **Christine**. **Ernie** provided brief background on the Group's remit and work to date.

2.0 PCT Community Food Worker

2.1 Christine explained that Community Food Workers are the promotional side of the PCT Dietetics department. They work in a variety of settings including Children's Centres and community centres providing weaning groups, after school clubs with young people, attending health fairs, giving cooking demonstrations making the link between food and health and running Cook and Taste courses which run for 6 weeks and are tailored to the needs of specific groups. The aims include getting people cooking again (or for the first time), promoting a balanced diet through Eatwell plates, making comparisons between home cooking and pre-packaged or tinned food etc.

- 2.2 Groups with a range of needs can be accommodated and where a group has a specific health condition (e.g. diabetes) that requires a special diet a Dietician will provide specialist advice along with general advice from the Food Worker.
- 2.3 BME and diverse cultural groups have mostly been concentrated within certain areas. However, there have also been recent moves to introduce more diverse foods into work elsewhere in the PCT area.
- 2.4 The Food Workers also work collaboratively with the Council's Parents Support Advisor and the Food in Schools team to support parents around issues including reducing salt and saturated fat intake and cooking a range of cultural foods. For instance Refugee Action is due to speak to a group of parents about different cultural diets.
- 2.5 The Group discussed the possibility of building community-access kitchen facilities in the new health hubs / polyclinics that are planned.
- 2.6 **AGREED: Abdi** to add information / recommendations to report based on the evidence gathered from Christine and the Group discussion.

3.0 Actions from last meeting - report back

3.1 **Abdi and Jackie** met on 28th Oct to work on report: *See Item 4 below*

4.0 Finalising report - what still needs to be done?

- Outstanding contacts: Andy Tyler (re childhood obesity); Nadia Khan (re school meals)
- Questionnaire completion and compilation; Neighbourhood meetings. **Ernie** to arrange.

5.0 Any Other Business

- 5.1 **Mildred** distributed Healthy Schools Newsletter for background info on healthy eating activities in schools
- 5.2 **Ernie** reminded the group that the final report had to be formally presented to the Overview and Scrutiny Committee and that it would be useful to know upcoming meeting dates and get the report on the agenda - he would follow this up before the next meeting.
- 5.3 **Ernie** asked all to encourage participants at LINK Neighbourhood events to complete Healthy Weight Questionnaires.

6.0 Actions

- **All** to distribute questionnaires at November Neighbourhood Meetings
- **Abdi and Jackie** to add information gathered from Christine to report
- **Ernie** to contact Andy and Nadia with upcoming meeting dates
- **Ernie** to confirm Overview and Scrutiny dates
- **All** to read latest draft of report and contact Abdi with any queries, amendments etc

Date of next meeting: 11.00am - 1.00pm, Mon 23rd Nov at St James Community Centre

Remember, it may not always be necessary to have 'physical' meetings. Task and Finish Group members are likely to be busy people with other calls on their time so think about other ways of exchanging information including using email groups, conference calls or sub-groups which can feed back to the main Group.

LINK Task and Finish Groups may also want to use LINK powers to conduct Enter and View visits to service providers – provided Good Practice protocols are observed and only authorised individuals (with appropriate training and CRB checks) take part and feed back to the whole Group.

Informal meetings with commissioners, providers, service users or the public can also be arranged as can public events at which local people can be invited to have their say and feed in suggestions or evidence about the topic under consideration. Remember that whoever your Group meets with in the course of its work – whether it be public sector officers, service users or members of the general public – it's important to let participants know how their input will be used to inform your report and recommendations and how they can get hold of the report once it is complete.

THINK!

Have you:

- Set an agenda that helps to progress your Group's Terms of Reference?
- Invited all the appropriate people?
- Followed up on actions from any previous meetings?
- Sent out all necessary papers and notes?
- Thought about what information you need to find out from any guest 'experts'?
- Appointed a note taker?
- Allowed all Group members and guests to have an input?
- Thought about what recommendations you might be able to make based on the information you receive at the meeting and any related discussions?
- Set and delegated any actions to be completed before the next meeting?
- Set a date, time and venue for the next meeting?

8) Research Methods

It is not the LINK's job to undertake major pieces of academic research – there are other people better placed to do that and you may want to find out who is involved in research or teaching about your Group's subject at your local University as they may be able to provide you with useful information or statistical data which can help to back up your findings or recommendations.

However, just because you are volunteer LINK members doesn't mean you can get away with producing a report which does not stand up to scrutiny and is not robust in its approach to data collection.

You must always back up any statements or recommendations with evidence which you have collected in the form of information from LINK members, the public, health or social care commissioners or providers, academic papers, media reports or elsewhere. Remember to include references to your data sources so that other people can check them or refer to them themselves if they should want to. See elsewhere in this Toolkit for further advice on this.

For people to have confidence in your report and recommendations you must be able to show that you have been ethical in the way in which you have collected your evidence and that you have not started out with predetermined outcomes in mind.

You should also always let participants know

- Why you want to speak to them and what authority you have to do so
- What you will do with the information you collect from them and how it will contribute to your report and recommendations
- That you will respect their confidentiality / anonymity if they request that they are not named within your report
- How they can obtain a copy of your Group's report when it becomes available
- Who they can contact if they have any further questions or concerns

In this way you can be sure that they are giving their informed consent when they speak to you and that there can be no confusion about why you have sought their contributions.

There are many ways to find the information you need and you may find that you need to use more than one of them in the course of your Group's work. Some methods are listed below:

Desk-based Research

Desk-based research is a useful way to find out background information, statistics, archived and breaking news stories, policy documents or strategies relating to your Group's topic. You can start by using search engines to look

online. This is also a handy way to search for phone numbers and email addresses for people you'd like to talk to.

But you don't have to use the internet to conduct this type of information-gathering exercise. You can also find out a lot of information from other media sources (broadcast and print), hard copies of reports, directories, information leaflets and so on.

However you gather this type of desk-based background information, remember to check how up-to-date it is and whether it comes from a reputable source. And don't forget to reference your sources in your report.

Questionnaires

Questionnaires can provide you with useful data which can be either quantitative (e.g. how many respondents answered 'yes' or 'no' to particular questions) or qualitative (e.g. 'give an example of a positive experience you have had using local support services') and also have the benefit of allowing you to use standardised questions. However, when putting together your questionnaire be sure you are clear about what information you want to find out, and why? Ask yourself how relevant each question is to your report and what it adds to your overall knowledge. What does it tell you that you didn't know before and what conclusions might you be able to draw from your results?

Also think about whether your questions are aimed at a general audience or a smaller sub-group. Do you need to consider language or accessibility in any way by, for instance, producing an Easy Read version or making it available in other languages or formats?

You will also need to consider how many questionnaires you need to get completed and returned in order to give you a reasonable overview of local opinion. Whilst LINK reports may not be expected to adhere to the same degree of rigour in questioning representative samples of the local population as academic researchers would use you should still aim to be as representative as possible. Therefore any information you can gather about respondents' characteristics in terms of equality and diversity would also be useful.

It may be helpful to conduct a small-scale pilot with a first-draft of your questionnaire to see whether there are any questions which turn out to be less relevant than others or anything that needs to be re-worded, added or removed before you finalise the questionnaire and circulate it to the wider public through whichever method or methods you choose.

Also remember that analysing and interpreting questionnaires can be very time-consuming so be sure that you are not asking more questions than is strictly necessary. You also need to identify a Group member or Support Officer to undertake the data collation and analysis and make sure that they

have been given enough time to complete their task and feed the results in to your final report.

Focus / Discussion Groups

A focus or discussion group would normally consist of a small or medium sized group of people who may have a common interest in a topic e.g. drug service users, youth workers, older people, people from a particular faith group, residents from a particular neighbourhood or another similar grouping.

You will probably want to include users of whichever service it is that you are looking into. Try to get a diverse cross section of these, if you can't you will have to take this into account when assessing their evidence.

The group will need a well-briefed facilitator or moderator to keep participants focused on the topic under discussion and ideally you will want the group's permission to record their discussion for reference although you will probably want to note key points / issues on a flip chart or similar as the discussion progresses.

As with questionnaires or polls you will need to think very carefully about the questions or subjects you ask a focus group to address – this should help the discussion to stay on track and not wander off into less useful areas.

You will need to think about how to recruit focus group members, where is the most appropriate venue to hold the meeting, whether you will pay travel or carers expenses and whether you intend to offer them refreshments. You will also need to delegate the related administrative tasks.

As with any research method it is helpful to think about the potential advantages and disadvantages of this approach. For example, a focus group may allow you to gather several opinions in a relatively short space of time and the interaction of participants may generate interesting information which you may not obtain in one-to-one settings. However, groups can be easily influenced by dominant participants and information gathered from groups can be harder to analyse than that obtained from individual interviews.

Online Polls

Another useful way to obtain a 'snapshot' of public opinion is to post a poll on your LINK's website. Ideally this should be distinct from an online questionnaire. The purpose of a poll should be to be brief and 'snappy' – ideally just one question or statement with a minimum of response options (e.g. 'yes', 'no', 'don't know' or 'agree', 'disagree', 'not sure'.)

A poll of this type is unlikely to be 'scientific' and – as with any other research method you use – you may want to include a caveat or warning in your report to this effect. A finding such as '80% of respondents agreed' is likely to be of interest. Although, as with any other statistical data, it will be useful to include

'actual numbers' as well as 'percentages' since 80% of 10 people may be less convincing than 80% of 1,000.

Members' Expertise and Experience

Always bear in mind that LINK members are an excellent resource and have a wealth of knowledge about local health and social care services which they will often be happy to share.

Make sure your LINK membership knows what your Task and Finish Group is working on and how they can contribute to it.

Invite members to join the Group if they want to get actively involved and ask your Support Team / Host Organisation to provide training if necessary.

Make sure they know how to contact you if they have information or evidence they would like you to be aware of, encourage them to participate in polls and invite them to take part in Focus Groups or Neighbourhood Meetings if they are interested in coming along.

'Enter and View' Visits

A useful tool which the LINK has in respect of gathering evidence is to conduct Enter and View visits to service providers.

In the context of you Task and Finish work it would be preferable to request a visit as an organic outcome of developing a professional relationship with service managers and senior officers who are well-briefed as to your role and Terms of Reference. This approach may be more productive than 'cold calling' on a health or social care provider.

In any event you should never conduct an Enter and View visit without acting in accordance with you LINK's agreed protocol and having a clear idea of who will be attending and exactly what they will be seeking to find out.

One-to-one interviews or interview panels

Your Group may want to speak to specific individuals who hold a lot of knowledge about an issue – service Commissioners, service Managers, frontline staff, academics responsible for data collection or analysis or others with professional or personal experience that is particularly relevant.

The best way to seek expert input in such cases is often to invite the individuals concerned to a face-to-face meeting with your Task and Finish Group members. This will allow you to develop a personal relationship with them, give you time to explain the background to your work and your Group's Terms of Reference, reassure them that you are looking for positive stories and examples of good practice as well as seeking to make constructive recommendations about any gaps in services or potential problems that you uncover. It will also give you an opportunity to put a series of questions to

each 'interviewee'. These questions should be thought through in advance of the meeting and designed to provide useful information for your report and recommendations.

It may not always be possible to arrange a meeting which the whole Group can attend so always offer to meet your key interviewees at their own office at a time that suits them and then delegate one or two Group members to ask them questions on behalf of the whole Group and report back at your next Group meeting.

Neighbourhood events

A good way to seek public opinion beyond the LINK membership is to hold public meetings in community venues. You could host these independently or as part of pre-existing community meetings. Such meetings are similar to Focus Groups but the people who attend will be 'self selecting' and therefore potentially a more random sample of local residents than those you might target to participate in a Focus Group.

As with Focus Groups, questionnaires, polls etc you will need to be very clear about how you introduce your topic to a general audience and what information you would like to find out from them. One relatively easy approach would be to ask people what they know about the topic – local drug services for instance – and then ask them what they think works well about them, what doesn't work so well and what could be done to improve them.

Again, as with Focus Groups, you'll need to give a lot of thought as to how you advertise the events, where you hold them, who will be responsible for room booking, ordering refreshments, facilitation, capturing information and providing feedback.

THINK!

Have you:

- Thought about the best method or methods to find out the information you need?
- Discussed the logistics of each method and allocated roles and responsibilities for arranging or delegating work?
- Worked out what questions you need to find answers to?
- Thought about how to record the responses you get and how they will inform your report and recommendations?
- Given yourselves enough time to do the work within your Action Plan?

9) Identifying Key Contacts

It's important to remember that Task and Finish Groups are not formed to represent or promote the opinions of their individual members or to present predetermined findings. The aim of the Group should be to seek out as much information about the topic they are considering as is possible within the time they have set themselves in their Action Plan and to form a collective response and recommendations based on an impartial interpretation of the information presented to them. In doing so they should think carefully about who might hold the information they need. Ideally they should consider a broad range of views and opinions from, for instance:

- service users
- families or carers
- LINk members
- the general public
- service providers from public, private and voluntary sectors as appropriate
- service commissioners
- academics
- local strategic partnerships
- umbrella bodies and networks

The type of contacts may vary according to the topic the Group is reporting on but should always include a representative cross-section of those with an interest in the subject.

It is also useful to consider any additional factors that might have an impact on people's awareness of services, access to them or requirements of them. The law recognises that certain groups may be more likely to experience inequality and your Group may therefore wish to consider making contact with people who can make an informed input in respect of

- Race
- Gender – including trans people
- Faith
- Disability
- Age
- Sexual Orientation

But these may not be the only groups to consider – other groups, carers for instance, may also have a particular interest in the subject you are studying.

So – how do you identify who you need to talk to?

Think about what you need to find out and who might have the information you're looking for. Perhaps the Group could draw up a 'wish list' of people or groups it would like to speak to using the bullet point lists above as a starting point and filling in any gaps. If you're not sure of the right person to speak to

(for example, who is the Commissioner responsible for the services you are looking at?) you could ask for advice or information from your LINK Support Team, other LINK members or go direct to the PCT or local authority with your question.

It may also be useful to ask everyone you speak to about your Group's work to suggest other useful contacts. This sort of 'snowball effect' can help you to gather information relatively easily but remember to make sure the contacts you make in this way represent a range of viewpoints and do not 'bias' your findings in any significant way.

When you've got a list of initial contacts, decide who is going to approach them with some information about your Group's Terms of Reference and invite them to attend a meeting or provide information or evidence in some other way.

Once your Group's work is underway and you are starting to focus on some preliminary findings or draft recommendations you may also find it useful to use LINK members as a 'sounding board' – either through questions posted on your website or through neighbourhood meetings. Local residents and service users have a wealth of knowledge that you can tap into – but always remember to feed back about what you have learnt from them and let them know what you've done with the information they've provided. Building up a trusting relationship now may help you and the LINK in the future!

THINK!

Have you:

- Thought about who you need to contact to find out the information you need?
- Made sure that different viewpoints are represented and that you are being objective in your choices of contacts?
- Thought about any gaps in knowledge and who you can speak to in order to fill them?
- Considered how the topic might affect different groups of people and made efforts to seek the views of diverse individuals and/or communities?
- Allocated Group members to make contact with the people or organisations on your contact list?
- Made efforts to let LINK members and the wider public have their say?

10) Interpreting Information

In the course of your Group's work you will seek out and find information from a number of sources – some of which may be contradictory and potentially even controversial.

Remember that in order to be credible with your 'audience' – including LINK members, the wider public and health and social care commissioners and providers – you must present your findings as fairly and impartially as possible. This does not mean that you can't make reasonable recommendations for improvements to services or the commissioning process, or even draw attention to serious failings if you have sufficient evidence, however you must be careful to interpret information as rigorously as possible.

Bear in mind that anyone who provides you with information may have a particular viewpoint or agenda – whether explicit or implicit – or may simply only be in possession of part of the facts.

Your job is to try to have a broad overview of things and to see how the different parts of the jigsaw fit together. Remember that the LINK is an independent network and is not there to promote any agenda in particular.

This is not to say that your Group should not look for, and highlight, examples of good or bad practice but it will be useful to 'test' the validity or credibility of information wherever possible or to take a balanced approach in presenting findings. You can do this by being careful to show that not all views in your report are necessarily those of your Group and that different opinions exist on certain aspects of the service you're examining. For example:

The PCT were able to list a number of ways in which they had consulted with the public about changes to services and received positive feedback. However, attendees at LINK Neighbourhood Meetings were largely unaware of the changes and were fearful that any change could lead to a reduction in local services. Whilst not disputing the work the PCT has done in this regard there would appear to be more scope for working closely with community development workers 'on the ground' to increase awareness within local areas and to build local trust and community input.

It's also perfectly legitimate to state that in some cases you may not have received enough information to draw firm conclusions.

The main thing to be aware of is that you should never present as 'fact' any statements which you cannot verify.

THINK!

Have you

- Been clear about which information you're presenting as the Group's opinion and which is the opinion of other people or groups?
- Made efforts to 'test' any potentially controversial statements made by contributors to your work?
- Been careful to show balance where there has been a divergence of opinions on particular issues?
- Been honest where you do not have enough information to draw a firm conclusion?

11) Attributing Information

This Toolkit has mentioned elsewhere the importance of backing up any statements your Task and Finish Report makes with credible evidence. This section aims to give you a little bit more help in doing just that.

There are a number of ways in which you can reference your sources or attribute information. For instance, if you use quotes from neighbourhood meetings, focus groups or one-to-one meetings you can credit them anonymously, for instance:

“I was disappointed with the service I received because I got the impression I was being treated like a statistic not as a real person with feelings.”

Female Service User

If you have sufficient information about participants you could add further details – but never give information which could identify an individual unless you have their express permission to do so:

“The community outreach workers have been very helpful with providing personalised information and following up to see how people have got on.”

Asian Male, 60+

Where you refer to more general information gathered from the public you can still show where the information came from and what the overall feelings were, based on recordings or notes taken at meetings, for instance:

The majority of participants at neighbourhood meetings were clear about how to access information about healthy eating but a significant minority were still unsure about 5-A-Day portion sizes.

If you refer to responses to questionnaires or polls it's easy to provide evidence for your statements but do remember to use actual numbers as well as percentages. For example,

Of the 84 people who answered this question 78 (93%) said they were aware of local media campaigns about this issue.

Finally, if you refer to newspaper articles, academic papers, government reports, local strategic documents, statistical data or similar sources you should always reference them in some way.

If you include a graph or bar chart make sure you give it an appropriate heading and say where the information comes from for example:

(Source: 2001 Census / Neighbourhood Statistics).

Other documents can be referenced within the main body of the text, as a footnote or in a separate 'References' section at the end of the report.

For instance, the following table is based on information found on the internet and the source is cited immediately below the table:

Table 1) Examples of References using the Oxford System

Sample Reference	Type of Source
1. S Kostof, <i>A history of architecture: settings and rituals</i> , 2nd edn, Oxford University Press, New York, 1995, p. 35.	book, 1 author
2. H Fraser & R Joyce, <i>The Federation house: Australia's own style</i> , Lansdowne Press, Sydney, 1986.	book, 2 authors
3. FS Kleiner, CJ Mamiya & RG Tansey, <i>Gardner's art through the ages</i> , 11th edn, Harcourt College Publishers, Fort Worth, 2001.	book, 3 authors
4. EH Gombrich, 'The early Medici as patrons of art' in EF Jacob (ed.), <i>Italian Renaissance studies</i> , Faber and Faber, London, 1960, pp. 279-311.	chapter in edited book
5. Parliamentary Standing Committee on Public Works, <i>Proposed common use infrastructure on Christmas Island</i> , Parliament of the Commonwealth of Australia, Canberra, 2002.	report, group author
6. RA Goldthwaite, 'The Florentine palace as domestic architecture', <i>American Historical Review</i> , vol. 77, no. 4, 1972, pp. 977-1012.	journal article
7. P Lawther, 'Cost planning: is it sustainable income?', <i>The Building Economist</i> , June 2003, pp. 4-12.	journal article
8. 'Federation Square: A tribute to the skill of the construction industry', <i>Construct in Steel</i> , vol. 15, no. 2, June 2002, pp. 12-14.	journal article, no author
9. P Edwards, 'Mud, glorious mud', <i>The Age</i> , 20 October 2004, pp. 6-7s.	newspaper article, authored

Source: www.howtowriteessay.net/referencing/oxford/ retrieved 12th February 2010

When you cite the same source more than once in a report you don't have to include the whole reference again. The most common ways of referring to a previous reference are to use Latin phrases as follows:

- *ibid.* ('in the same place'). This should be used when a reference source is exactly the same as that cited immediately previously. Although if it's from a different page of the same document you will need to make that clear e.g. *ibid.* p62
- *op. cit.* ('in the work cited'). This should be used in any other case where you're citing a reference previously referred to within your report e.g. 2001 Census, *op. cit.*

THINK!

- Have you backed up all your statements with credible references?

12) The Report Writing Process

As your Task and Finish Group progresses through its Action Plan towards its final report and recommendations it will be useful to gather information and group it under key headings within early drafts of the final document.

Early Drafts

Early drafts of the report should include the headings you anticipate including within your final report although you may find you want to amend these as your work progresses. Some suggestions are listed below although these are by no means compulsory or definitive!

- Contents page
- Executive Summary
- Introduction and methods of gathering information
- Terms of Reference
- Group Membership
- The Strategic Context
- Mapping and Scoping Local Services
- What the Public Think
- Questionnaire Results
- Case Studies
- Equality Impact Assessment
- Gaps in Services
- Good Practice
- Recommendations
- Appendices (e.g. examples of questionnaires)

Some of these, such as the Introduction, Terms of Reference and Group Membership will be easy to draft fairly early in the process and may need only relatively minor amendments later on.

Other sections such as The Strategic Context, Mapping and Scoping Local Services, What the Public Think, Questionnaire Results, Case Studies, Equality Impact Assessment, Gaps in Services, Good Practice and Recommendations will need to be drafted and amended throughout the lifetime of the Group.

The Executive Summary will usually be the last section to be written and should be a concise summary of the key points of your report including your recommendations.

An easy way to start compiling the report is to begin with a Word document consisting of blank pages headed with some of the headings suggested above. Appoint someone to go through the Group's notes or minutes after each meeting and cut and paste key findings, quotes, statistics or agreed recommendations under the appropriate headings. These will quickly mount up over the weeks and months of the Group's lifetime and can be edited and

amended as you go along rather than leaving you with a last-minute panic as you attempt to remember everything at the 11th hour!

Interim Report

A handy way of getting feedback on your report whilst it's still a 'work in progress' is to circulate an interim report mid-way through the process. You can include this in your Action Plan. It doesn't have to be a big document – just a summary of what you're doing, why you're doing it, who you've gathered evidence from to date, who else you plan to speak to and any emerging findings. These findings may or may not change before you publish your final report but your Interim Report should prompt LINK members, the wider public and others to get thinking about what they would like to see included in your Group's work and should encourage them to comment, submit new information and correct any inadvertent errors.

An Interim Report is also a good way to show that your work is transparent and inclusive and that you welcome discussion and input. This is important for your LINK's credibility as a network which gives a voice to public opinion.

When you circulate the Interim Report include a timescale for completion of the final report and ask for comments by an agreed date.

Making Recommendations

Recommendations – or actions to be taken by partners in response to your report's conclusions – can often be the most difficult part of a report to write but they are crucial to your ability to monitor the success of your report in the coming months and to make sure it doesn't simply gather dust.

The most important thing to bear in mind is that your recommendations must be based on conclusions you've drawn as a Group based on the information you've gathered and presented in your report and not on any preconceptions you may have had at the start of the Task and Finish process.

You must be able to show the evidence behind your recommendations and not leave yourself open to any criticism or accusations of bias.

If you have not been able to gather sufficient evidence in respect of any element of your report it's perfectly acceptable to recommend that further work needs to take place on this particular topic.

Final Draft

As you move into the final weeks of your Action Plan you will need to revisit your report and check that you have included all the points picked up in the meeting notes which you have kept along the way and that you have addressed any additional points raised after you circulated your Interim Report. Try to ensure that you have only included information and recommendations which are relevant to the task in hand. Check to see that

you have not repeated yourselves unnecessarily and that all your references are correct and complete, including internal page references. Make sure you have explained any abbreviations or acronyms. Remember to date your report and include contact information and an offer to provide the report in alternative languages and formats if this is something you are able to do on request.

Ask someone who is unfamiliar with your work to proof read the report and check for spelling mistakes and 'typos' as well as to offer feedback on its 'readability'. Remember, what makes sense to you might not be as clear to anyone who is less familiar with the subject.

At this stage you may also decide to show your final draft informally to the Commissioner to whom you'll be formally submitting it. This will give them a chance to be forewarned of any positive findings or constructive suggestions for improvements to services and will also give them an opportunity to correct any factual errors prior to publication – although they should not influence the substance of the report.

Report submission

When you are satisfied that the report is as good as you can make it – you are ready to submit it to the Commissioner with overall responsibility for the service you have been considering.

It may be useful to draw up a standard covering letter from your LINK Chair to Commissioners introducing the report, pointing out that you hope it will be a useful addition to their strategic planning and reminding them of their duty to provide a written response to its recommendations within 20 days in line with Local Government and Public Involvement In Health Act 2007. You may also add that the LINK has the power to refer any unsatisfactory responses to the local Overview and Scrutiny Committee (OSC).

THINK!

Have you:

- Started a first draft of your report very early in the Task and Finish process by grouping together information under key headings?
- Produced an Interim Report at the mid-point of your work and asked for feedback from LINK members and others?
- Thought about how your recommendations fit with existing local or national strategy?
- Produced a final draft towards the end of your work and circulated it to key contacts for comment and fact checking?
- Finalised your report and recommendations in light of any comments received?
- Formally submitted your report to the appropriate Commissioner and asked for a response to your recommendations within 20 days under the

terms of the Local Government and Public Involvement in Health Act 2007?

13) Equality Impact Assessment

Whilst your Task and Finish Group is considering its topic it is important to think about the diversity of existing and potential service users, because different communities may have different needs and views to contribute. You should therefore ask yourselves questions about how the service or issue you're assessing might potentially impact on all the current legislated areas of equality and human rights – both positively and negatively.

The main areas you need to think about are: age, disability, gender, gender reassignment, race, religion or belief, sexual orientation and human rights.

An Equality Impact Assessment (EIA) will help your Group to think carefully about the impact of their work on local people. It will help you to take account of the views of diverse groups and make recommendations that promote quality and equality and maximise the benefits to all local health and social care service users.

Your LINK or Host Organisation may have an EIA template which you could use to help you with this process but, if not, there are a few basic questions you should ask yourselves. For instance:

- What aspects of the service or issue you are considering (including how it is delivered or accessed) could contribute to inequality?
- Could the service or issue have an impact (positive or negative) upon the lives of people, including members of particular communities and groups? Do you have evidence for this?
- Are particular communities or groups likely to have different needs, experiences or attitudes in relation to this service or issue?
- What relevant consultation has already been undertaken regarding this issue?
- Are there any examples of existing good practice in this area – such as measures to improve access to services among particular groups?
- What data, research and other evidence or information is available which will be relevant to this EIA?
- Do you need any further data or information to carry out the assessment?

Major public sector organisations tend to do quite elaborate impact assessments because they have the resources to do so. However, a LINK EIA does not have to be a major piece of work, it must be proportionate to the potential impact on diversity that your work may have and to the resources you have available for carrying it out. For example, the EIA could be carried out via a discussion group of diverse people or a short questionnaire. The important thing is that you check your work for its equality and diversity impact and take

steps to minimise any potential negative impact and maximise any positive impact.

Ideally your Task and Finish Group should be as diverse as possible (as noted earlier in this Toolkit) but you should not rely only on your own opinions or experiences to conduct an EIA. This is another area of your work which could involve the wider LINK membership, other local residents, community groups and networks. When considering how you will involve and consult other people in equality assessing your work, you need to think about internal and external audiences and all areas of your remit.

Try to involve people from all the relevant 'equalities groups' in considering the impact of your work on local services and the ways in which people access them and use your discussions with them to help inform any recommendations you make. These might include:

- Practical changes to help reduce any adverse impact on particular groups (Consider changes in communication methods, providing language support, collecting data, revising service provision or involvement activities)
- Changes to improve access to, and take-up of, services
- Changes to increase awareness of the service
- Changes to Increase awareness of the needs of diverse 'equalities groups' amongst health and social care staff
- Changes to encourage wider public involvement of 'equalities groups' in the consultation and engagement activities carried out by services
- Improved monitoring and evaluation of service take-up by diverse groups

THINK!

Have you:

- Thought about how your Task and Finish issue might positively or negatively affect service users on the grounds of equality and human rights?
- Considered this in relation to the legislated areas of age, disability, gender, gender reassignment, race, religion or belief, sexual orientation and human rights?
- Looked at available evidence or existing consultation about this?
- Involved LINK members and other local people and groups?
- Used feedback from 'equalities groups' and your own research to inform your recommendations?

14) Publication and Publicity

You've produced a report, come up with a set of recommendations based on your findings and presented your work to the relevant service commissioner – well done!

Your next step is to make sure that as many people as possible are aware of your work and the reaction you've received to it.

There are a number of ways in which you can publicise your report. These might include:

- Putting a downloadable copy on your website
- Putting a copy of the commissioner's response on your website
- Sending out a press release to local papers and radio stations
- Keeping an eye on news stories – national as well as local – which relate to the subject matter of your report and using them as a way of attracting media attention
- Sending copies to key individuals locally, regionally and nationally
- Sending copies to individuals who have contributed evidence during your information gathering process
- Writing a story for your newsletter and circulating it to your membership and other contacts including community centres, health centres etc
- Asking your PCT and local authority to include a link to your report on their websites
- Asking local voluntary, community and faith groups to include information in their newsletters
- Using opportunities to mention the report in public meetings and in your everyday LINK networking activities
- Including details in your annual report

You may also be able to think of others. Be creative!

THINK!

Have you

- Used as many ways as possible to let people know about your report?
- Made sure that commissioner's responses are also made available to the public?
- Thought of ways to link your report to current news stories?

15) Following Up

Having put in so much work to complete and publicise your report the last thing you will want to do is let it sit on shelf gathering dust so it's important that having made a set of recommendations you take steps to follow them up.

Although the Group will not need to carry on meeting regularly following completion of its report you should think about how you will monitor progress against your recommendations in the short, medium and long terms.

This is something you can include in your original Action Plan but also something that may develop over time as a result of your work.

For instance, you might want to recommend that a LINK member – perhaps a member of your Task and Finish Group or another member with relevant knowledge or experience – should be invited to sit on a local strategic or commissioning body to ensure that issues of concern to LINK members, patients, service users and the general public remain on the agenda and that LINK recommendations help to inform the planning and commissioning process.

You may also want to set some dates over the months and years ahead to write to the commissioner asking for an update on progress. Any responses can be made public.

Remember that if you are unhappy with the response you get from the relevant commissioner the LINK has the power to refer issues to the local Overview and Scrutiny Committee (OSC) for further comment and action.

THINK!

Have you

- Included 'follow up' activities in your Action Plan?
- Thought about strategic ways to ensure an ongoing LINK involvement in future service planning, commissioning and monitoring?
- Made partners aware of the powers you have to follow up on your recommendations?
- Made sure you know who is responsible for following up on your recommendations?

For further information, details of Liverpool LINK Task and Finish Training courses or additional copies of this Toolkit please contact:

Liverpool LINK Support Team
Liverpool Charity and Voluntary Services (LCVS)
151 Dale Street
Liverpool
L2 2AH

Tel 0151 227 5177

Email info@liverpoollink.org.uk

Web www.liverpoollink.org.uk

Copies in Easy Read, large print or other formats and languages are available on request.

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