

# DISCUSSION GUIDE:

## CLIENT VOICE AND ENGAGEMENT

### Purpose of this Discussion:

When engaging clients or constituents more deeply in the work of your organization, it is helpful to examine not only the ways they are already involved, but also the quality of that engagement. Understanding who has power and how to share it is key to effectively involving constituent voice in your work. This agenda and the accompanying worksheet can help you to delve deeper into individual programs or areas of your work and begin to generate concrete ideas for next steps in engaging clients.

### Hoped-For Outcomes:

- Identify opportunities for clients to have more voice and leadership in your organization
- Generate a list of concrete practice shifts that can be proposed to others in the organization

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### 90-MINUTE AGENDA AND DISCUSSION QUESTIONS

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#### Round of Introductions and Personal Reflection 15 min

Start with a round of introductions where people respond to the following prompt:

Describe a time when you felt like your opinion and voice was really valued

**Note:** You may want to write down answers on a flipchart for everyone to see and remember.

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#### Identifying Current Leadership Development Practices 15 min

As a group, brainstorm answers to the following question:

How do we currently honor client's voice and cultivate their sense of leadership and empowerment?

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#### Eight Levels of Client Voice and Engagement Exercise 50 min

(10 min) Break the group into small teams of 3-4 participants and ask each team to assess which categories the current practices of a program area identified earlier fall into, according to the "scale" worksheet attached.

(15 min) Next, have the small teams report out on how they categorized the current practices and compare/contrast views and opinions.

(25 min) As a large group reflect on the following questions to begin mapping out alternatives:

How could we change programs to involve a higher level of participation by our constituents? How would this benefit and challenge staff? How would this benefit and challenge clients?

What concerns or risks might there be in changing programs to emphasize client leadership, voice and initiative?

What would be the first step to implement these changes? What would be the next two steps?

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#### Closing and Evaluation 10 min

Ask people to identify one thing they liked and one thing they would change about the conversation.

Close the discussion and thank people for their participation.

**Note:** If there was continued energy during this exercise, you may consider forming a group that will continue to work on this issue in your organization and plan for how to move ahead.

## Scale of Client Voice and Engagement

Organizations engage clients in a variety of ways at the same time. The types of engagement on the left side of the scale can be stepping stones to greater client leadership and initiative in the future (represented on the right side of the scale).

Use the chart below to consider the various modes of engagement and how the examples provided apply to your organization. In the last row, write down your own examples of existing work and generate new ideas.

<b>Staff Directed</b>	<b>Client Turnout</b>	<b>Staff Selected</b>	<b>Client Informed</b>	<b>Client Consulted</b>	<b>Staff Initiated</b> <small>Shared Decision-Making</small>	<b>Client Initiated &amp; Directed</b>	<b>Client Initiated</b> <small>Shared Decision-Making</small>
Clients are directed as to where to stand, what to say, what signs to hold, etc.	Clients attend an event or meeting but have no clear role	The most skilled clients are invited to "represent" all clients	Clients are informed of a project's purpose, invited to participate, and can say no	Staff consult with clients about a question or problem and consider feedback in design	Staff identify problem, craft solution and invite client participation	Clients produce own program or activity, in addition to what org already offers	Clients identify problem, craft solution, and invite staff support

**Note:** This is adapted from the 8-stage "ladder of participation" by Roger Hart, as described in Varney (2007).

