

**Making**

**decisions about**

**face-to-face**

**engagement**

**A guide and template for local Healthwatch**

**Produced July 2021. Last reviewed December 2021.**

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## About

**13 December 2021:** This guidance was originally published in July 2021 and has been reviewed December 2021.

In December 2021 the Government reintroduced COVID-19 restrictions in England.

In response to the new restrictions, we recommend that you [take the following steps to protect your staff, volunteers and your community](#).

This advice includes pausing the face-to-face activity you have planned over the next few weeks, especially if this work can occur remotely.

The potential impact of the Omicron variant of COVID-19 is not yet fully understood. So, any action you can take to help reduce community infection and the impact on services is helpful. Once the effect is more fully known, we will better understand how this will affect our ability to speak to people face-to-face.

However, this guide can be used for planning engagement for once restrictions are lifted.

This guidance highlights issues that you should consider when:

- Deciding to undertake any face-to-face activity;
- Supporting staff to engage people safely; and
- Ensuring equality of access to our services.

This guide expands on best practices shared by local Healthwatch across England and includes a decision-making template.

## What should you consider?

### The process you use

It is important to establish a decision-making process for approving face-to-face activity. This will help make sure your decisions are consistent, transparent and accountable and can be done by temporarily amending your existing decision-making policy. This guide includes a template, which sets out the questions you should consider, some of which are explored more fully in this section.

#### Useful guidance

- [A guide to helping you choose your decision-making process](#)

### Government guidance and regulations

Before deciding when face-to-face engagement should occur, it is vital to check that you understand and can comply with the latest Government guidance and regulations about COVID-19 nationally and any that may apply locally.

#### Useful guidance

- [Government guidance on COVID-19](#)

### Insurance cover

We would also advise checking that any actions you are planning comply with the terms of your public and employers' liability insurance to protect the organisation in the event of a claim.

## COVID-19 transmission rates and outbreaks

When planning or carrying out an activity, don't forget to check:

- The current rate of transmission of the virus in your area, including new variants of the virus; and
- Whether there are active outbreaks of COVID-19 in the health and care service or community you are targeting.

## The people you are engaging

Think about the individuals you are engaging with and ask:

- Might they be more anxious about meeting face-to-face because they are at higher risk from COVID-19 or are not vaccinated?
- Are we engaging people face-to-face because they face barriers that prevent them from being engaged by phone or online?
- Have we carried out an equalities impact assessment and taken action to reduce the barriers to participation that people might face?
- Do we have the correct consent process in place?

### Useful guidance

- [How to carry out an equalities impact assessment](#)
- [A guide to gaining consent](#)

## Your engagement method

Think about whether your engagement could be carried out digitally, for example, using an online focus group or remotely, for example, via telephone interviews or paper surveys. Also, consider how your approach would impact both participation and your findings.

If your audience does not have online access, could they be supported to take part by telephone or online? For example, could you provide equipment or internet access or telephone credit?

To mitigate against inequality, you may wish to consider a blended approach with face-to-face engagement for people with barriers to participation and remote engagement for those who do not face obstacles.

If you engage people online or by telephone, you may wish to acknowledge this as a potential limitation when making your findings public.

### Useful guidance

- [Online engagement techniques](#)
- [How to engage with people who are not online;](#)
- [Engaging seldom heard people in research](#)

## Views of local stakeholders

Before starting your activity, don't forget to discuss your plans with your local authority commissioner, NHS Clinical Commissioning Group and other relevant stakeholders.

It's also essential to gain the consent of the health or social care provider before visiting their service, including for Enter and View visits.

We would recommend talking to your local Care Quality Commission team to understand their approach to local inspections. It is also important to check any requirements your stakeholders may have such as requiring people to have an NHS COVID Pass or to wear masks.

### Useful guidance

- [Healthwatch and CQC working together](#)
- [How to get an NHS COVID Pass](#)

## Health and safety

Before each activity, don't forget to complete a full risk assessment in partnership with your staff, volunteers and relevant providers and partners.

### Useful guidance

- [Health and Safety Executive Risk Assessment Template](#)

## Issues specific to Enter and View visits

If you are planning an Enter and View visit, we would strongly advise:

- That before conducting an unannounced visit you assess the additional risks and complications this may generate, such as gaining consent from residents;
- To have consent to Enter and View from the commissioned service provider;
- To consider the inspection approach being taken by your local CQC team;
- That providers have the right to reject a request to Enter and View; and
- To carry out a health and safety risk assessment with the provider before the visit takes place.

Since 11 November 2021, people visiting adult care homes in a professional capacity are required to be fully vaccinated against COVID-19. This legal requirement includes local Healthwatch representatives.

From 1 April 2022, this legal requirement will be extended to cover visits to NHS services.

### Useful guidance

- [A guide to planning virtual visits](#)

## Issues specific to events

There are specific issues to think about if you are planning a face-to-face event. The Institute of Fundraising has produced a helpful guide for organisations carrying out community fundraising. Much of the advice in this resource can be applied by you when planning face-to-face activity.

Don't forget to also:

- Consider whether use of the NHS COVID Pass, masks and other safety measures is appropriate;
- Carry out a full risk assessment in partnership with relevant stakeholders;
- See if it is possible to have your event outside and, if you can't, make sure there is good ventilation;

- Ask every participant or visitor to use the 'Venue check-in' QR code tool on their NHS COVID-19 app or, if they can't, to provide their contact details for contact tracing purposes.
- Make sure any information you take for contact tracing purposes is secured and kept in line with [GDPR](#).

### Useful guidance

- [Institute of Fundraising guide to community events](#)
- [Data protection guidance](#)
- [HSE risk management template for event organisers](#)

## Staff, volunteer and public safety

Providers of local Healthwatch services have a legal duty of care towards staff, volunteers and the public you engage. So, when carrying out face-to-face engagement, it is advisable that staff and volunteers :

- Understand the risks that you have assessed, the steps you have taken to make work safe and have an opportunity to discuss any concerns.
- Be given the protective equipment they need to carry out their work, such as face masks or hand sanitiser.
- Know the importance of alerting you if they have had any [COVID-19 symptoms](#) before coming to work or carrying out any face-to-face activity.
- Carry out a [lateral flow test](#) before visiting health and care services or attending community events.
- Consider the safest way to travel to work and face-to-face events, for example by using their own transport rather than public transport.
- Wear face coverings, especially in crowded area, to reassure the public and reduce the risk of COVID-19 transmission.
- Think about the precautions they can continue to take such as practising social distancing and washing hands regularly.
- Understand that they might be asked about their vaccination status by both the public and the services you visit and have an answer prepared. This is especially important as organisations may [adopt the NHS COVID](#) pass as a condition of entry. Legislation requires our staff and people to be vaccinated when visiting care homes and this will be extended to all NHS services from 1 April 2022.
- Feel empowered to use their judgement to end any face-to-face engagement when they feel it is not COVID-19 safe.

### The need for staff and volunteers to be vaccinated

Since 11 November 2021, people visiting adult care homes in a professional capacity have been required to be fully vaccinated against COVID-19. This legal requirement will include local Healthwatch representatives, when it is safe for you to restart your face to face engagement.

Given this, any staff and volunteers that will be visiting care homes will need to get an [NHS COVID pass](#).

This policy will be extended to cover all NHS services from 1 April 2022.

COVID-status certification may be required as a condition of entry for visitors to other settings. So, if your staff and volunteers are vaccinated, you should also encourage them to get an [NHS COVID pass](#).

### Useful guidance

- [What are the symptoms of COVID-19](#)
- [How to stop the spread of COVID-19](#)
- [How to order a lateral flow test](#)
- [How to get an NHS COVID Pass](#)
- [Current Government COVID-19 guidance](#)

## Get support

If you have any further questions, please talk to your [Regional Manager](#). To keep up with the latest best practice and discuss the impact of COVID-19 on your work, why not join the NHSE Engagement Practitioners Network by emailing: [england.engagementpractitioner-network@nhs.net](mailto:england.engagementpractitioner-network@nhs.net).

## Annex A – Decision-making template

Use this template to help you make decisions about face-to-face engagement

Question	Answer
Dates of planned engagement	
Where will engagement be conducted?	
What is the purpose of the engagement activity?	
Which specific communities are you hoping to reach?	
Have you carried out an equality impact assessment? (please attach).	
Have you assured yourself that you are not acting against government guidance or regulations on COVID-19?.	
Have you checked your insurance coverage?	
Why does this engagement need to happen now?	
Which method of engagement do you plan to use (e.g. face to face, remote or blended)?	
Which stakeholders have been consulted?	
What are the limitations of the engagement method planned?	
Who will carry out the engagement and how will they travel?	
Has a health and safety risk assessment been carried out? (please attach)	
What measures are in place to support COVID-19 secure engagement (e.g. training, equipment).	
Why do the benefits of this activity outweigh the risks?	
<b>Approval</b>	
Date of approval	Approved by: