



# **Consumer Advisory Group Review Project Report and Recommendations**

Jacinta Cross, Henrique Van-Dunem,  
Leah Martin and Mel Kelleher

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### **Acknowledgments**

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The project team consisted of Jacinta Cross, Henrique Van-Dunem, Leah Martin and Mel Kelleher.

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Neami Limited  
Head Office  
305 Arthur Street  
Fairfield Vic 3078  
Phone: 03 9481 3277  
Fax: 03 9481 5366  
Email: [admin@neami.org.au](mailto:admin@neami.org.au)

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## EXECUTIVE SUMMARY

In 2009, the Neami Board of Directors instigated an audit of Neami's consumer participation practices. The results from this audit were compiled into *The Consumer Participation and Leadership (CPL) Report 2010*. The report recommended further investigation into consumer participation and leadership across the organisation. This current project was initiated as a result, and aimed to review the structure of the Consumer Advisory Groups (CAGs).

The project team used a focus group format to conduct consultations with all of the existing CAGs at Neami, as well as staff, management, the CEO, external community organisations and experts in the consumer movement. The consultations took place in two phases over a four month period. The data from each consultation was thematically analysed using a qualitative research framework. Additionally, a brief online survey about staff opinions of CAGs was created based on the data from the first phase of the project. It was completed by 159 staff members, approximately 50% of all service delivery staff, giving the project a limited quantitative component.

The project team initially assumed that the recommended changes to the CAG structure would examine CAG governance and be largely operational. The first phase of consultations was based on this assumption largely exploring how the current CAG structure could be improved. Principles for future governance and operational practices were developed as a result of evaluating current CAG practice.

However the major finding from phase one was that the purpose of CAGs was ambiguous. Consumers, staff and managers across different states, held varying views about the main role of CAGs. One of the weaknesses identified in the current model is that the CAGs are not linked into any of the formal decision-making structures in the organisation, and so operate in isolation. They are dependent on the state manager for agenda setting and do not have a sense of a broader purpose.

All parties consulted expressed the need for a clear, nationally consistent CAG role yet there was lack of clarity about what this might be. After collation of the first phase data, it became apparent the project needed to shift its focus and that the CAGs could not be substantively improved by focusing primarily on operational and governance issues. The project team set out to identify a clear direction for the future.

As a starting point, the information gathered in the first phase of the consultation was examined in a more conceptual way. A significant component of the data emphasised the importance of consumer participation beyond the individual level, and the role the CAGs currently play in supporting the development of consumer leadership skills.

The second phase of the project involved additional consultations with the CEO, CAG members and experts in the consumer movement. Partnerships with other organisations to the mutual benefit of the organisation, Neami and consumers were explored. All expressed excitement at consumer leadership development as a new purpose for CAGs and emphasised the importance of adequate support, training and resources to ensure this is

possible. The project team has explored an incremental, phase-based transition period to implement this change.

The recommendations of this report include:

- Phasing out the current CAGs
- Creating leadership development opportunities at a state level
- Integrating consumer participation into organisational planning and decision-making structures associated with implementation of Neami's Strategic Directions
- Ensuring consumer involvement is considered in the establishment of terms of reference for other projects and working groups within Neami
- Strategies to improve communication between management, staff and consumers regarding consumer participation

In compiling the recommendations the project team referred to Neami's vision and mission statements. Full citizenship and the approach of the Collaborative Recovery Model (CRM) are the core basis for recommending that the current CAGs are phased out, and that consumers are integrated into all levels of planning and decision-making within Neami. Opportunities will be created for consumers who identify an interest in developing their leadership skills, and pathways established to activities within Neami, employment in the mental health sector or other roles in the community.

## INTRODUCTION

The Board initiated *Consumer Participation and Leadership (CPL) Project* examined consumer participation and leadership at Neami in 2010 and recommended a review of the Consumer Advisory Groups (CAGs). Following this recommendation, the CAG Review project commenced in June 2011. Neami allocated funds to this project to employ three part-time project workers (1.0 EFT) with a lived experience of recovery. Based on the recommendations from the *CPL Report*, the CAG Review Project sought to consult key stakeholders about the scope and functioning of the CAGs to identify areas for improvement and to develop a plan to strengthen the CAG functioning within Neami. This report outlines the CAG Review Project activities, explains the rationale behind the two phases of the project and outlines recommendations for future practice.

## PROJECT BACKGROUND

### CONTEXT OF CONSUMER PARTICIPATION

Both the *CPL Project 2010* and the current CAG Review Project are Board initiated and reflect the Australian Government's 2010 National Mental Health Strategy. The strategy states that as key stakeholders in mental health services, consumers need to be adequately resourced and in a position to influence service development. The National Standards emphasise the importance of consumer participation and specify that consumers need to be involved in service planning, implementation, review and evaluation.

Historically, Neami's consumer participation practices have reflected this ethos:

***"Consumers have been actively involved in the development of Neami from the beginning, through shaping its activities, program planning, policies, and its growth and development."*** (CPL Report 2010)

Consumers have had a high level of input since Neami's inception, however recently there has been a period of rapid and substantial growth that has necessitated a review of consumer participation. Further to the recommendations outlined in the *CPL Report*, the CAG Review project sought to examine the Neami CAGs as part of enhancing consumer participation structures.

### CONSUMER PARTICIPATION AND LEADERSHIP REPORT AND CAG DISCUSSION PAPER

The Consumer Participation and Leadership Project conducted in 2010 found that:

***"Neami's five Consumer Advisory Groups (CAGs) were often cited as being among the most important evidence of consumer participation in Neami. They were valued for some excellent work but the CAGs were also struggling in several ways."*** (CPL Report 2010)

Key needs for improvement were identified as:

- ***"Strengthening CAG structures and processes especially communication;***
- ***"Creating a more planned approach to consumer participation – with more inclusiveness;***

- ***“Tapping into external leadership resources;***
- ***“[Increasing] consumers’ capacity to shape and influence Neami’s service delivery and strategic development.”*** (CPL Report 2010)

The *CPL Report* recommended a further project regarding role and function of CAGs “to include discussion of alternative structures and approaches”.

The *Neami CAG Discussion Paper* was written after consultations with CAGs were carried out by a member of the Service Development Team following the completion of the *CPL Report 2010*. The paper outlined some of the key operational concerns with the current function of CAGs within Neami. *The CAG Discussion Paper* provided the starting point for the consultations held in the first phase of the CAG Review project consultations.

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#### CAG TERMS OF REFERENCE

Neami first established state-based Consumer Advisory Groups in 2002 and a common *Terms of Reference* was created. The *Terms of Reference* cover the operational and governance components for the CAGs and were last updated in 2008. The project team drew on the *Terms of Reference* a number of times throughout the consultations.

## CONSULTATIONS AND PROCESS

The original aims of the project were to identify the strengths within the current CAG structures as well as opportunities for development. Consultations with consumers and staff were conducted in two specific phases.

The first phase consults were based on five key areas of enquiry as identified by the *CPL Report* and the *Neami CAG Discussion Paper* being:

- Getting onto the CAG
- Communication
- Role and Function
- Support and Training
- After the CAG

Although the underlying assumption at the outset of phase one was that the changes required to CAG would be operational in nature, the data indicated that clear purpose was required, which would result in changes to CAG structure. A shift in the focus of the consultations was needed in order to determine the future possibilities for the CAGs. Phase two then focused on other potential structures and functions for CAGs as well as leadership development opportunities and frameworks that were already in place within the community.

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### PHASE ONE CONSULTATIONS

In phase one the project team aimed to ensure all levels and regions within the organisation were involved.

The consultation participants included the CEO, 1 State Manager, 7 site or regional managers, 32 consumers, 6 Peer Support Workers (PSWs), 3 ex-CAG members, 6 Community Rehabilitation Support Workers (CRSWs) and 4 community contacts.

At the time of consultation, Neami had five CAGs in operation; one in Victoria, one recently formed CAG in Queensland, one in New South Wales (recently two had joined together) and two in South Australia.

The focus groups investigated the five key areas of enquiry and were run as an open forum to allow for a free flow of ideas and conversations. All feedback was recorded on butcher's paper under the heading of each theme. Where possible the project team met separately with consumers and staff to assist in drawing out differing perspectives.

The project team also consulted with similar mental health services that had CAGs or comparable groups in an attempt to identify a "CAG best practice". Consultations beyond Neami included: Mind, Northern Area Mental Health Service (Vic), Australian Community Support Organisation, Beyond Blue's Blue Voices program, Mental Illness Fellowship Victoria, and Psychiatric Rehabilitation Australia. These consultations focused on what these organisation were currently doing, what was working and what was not.

During this phase, PSWs who had expressed interest in the project were also contacted. The PSWs discussed their experience of CAGs or similar bodies and what strengths and weaknesses they had encountered in these groups. Consultations were also held with three ex Neami CAG members.

A planned consultation with the Board of Directors did not proceed due to Board time constraints; however some feedback was received from Board members.

The results from phase one took the project to the same conclusion as the *CPL Report 2010*. It became evident that rather than improving the current structure of the CAG, a different approach was required. A second consultation with the CEO was conducted and the project shifted to investigate alternative structures and roles for CAGs based around implementation of the strategic directions, leadership and capacity building.

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## PHASE TWO CONSULTATIONS

At the commencement of the second phase, the project team re-examined the data from phase one with a more thematic focus. The key themes of leadership and decisional power were identified. The project team then continued consultations with CAGs and other parties in a similar manner to phase one by facilitating discussion around the five identified thematic groups. In addition, questions around leadership development and other opportunities were asked.

A staff survey was developed by the project team in conjunction with the Neami Research, Policy and Project Worker. The survey aimed to gauge staff awareness and attitudes on a number of topics related to the CAGs, including role and function, possibilities beyond CAGs and staff understanding. The questions and options presented in the survey were informed by the feedback from the first phase consultations. The staff survey was sent to all staff excluding head office staff and its response rate was 48%. The staff survey respondents consisted of 8 PSWs, 94 CRSWs, 14 Senior Practice Leaders, 21 managers, 5 community artists and 17 unspecified, totalling 159 respondents.

External consultations consisted predominately of organisations which were potential partners in developing leadership skills for consumers. This included Our Consumer Place, Leadership Vic and MIFSA/Baptist Care's Peer Work Project. The project team identified a number of possible organisations that could partner with Neami for leadership development, including Leadership Plus.

Consultations were also held with four prominent consumer workers from the mental health sector. The aim was to discuss the idea of consumers as leaders and to ensure that Neami's approach in the future is in line with the consumer movement.

The Chief Financial Officer was also consulted to ascertain how much money was currently being spent on consumer participation endeavours within Neami.

At the conclusion of the second phase, the project team commenced analysis of the data using a thematic framework. This process identified key themes that formed the basis of the principles and recommendations outlined in this report.

## FINDINGS

The key finding from phase one consultations was that the role of CAGs is ambiguous and understood differently by consumers, staff and management across different states.

Phase two findings shed light on the current perceived functions including:

- Participation in service development service planning, and
- Leadership and skill development

## PHASE ONE: EXAMINING CAGS OPERATIONALLY

The results from the first phase of consultations shed light on CAG governance and operational factors as well as eliciting diverse views as to the role and function of CAGs. Included in the examination of the data are principles that were developed directly from consultations with staff and consumers regarding each area of enquiry. They are intended to guide all future consumer participation at Neami.

### 1. GETTING ONTO THE CAG

As a starting point for consultations it was salient to explore with consumers why they joined the CAG and what they hoped to achieve.

How consumers find out about the CAG and the catalyst for applying are questions that speak to the heart of consumer participation. It was important to uncover how well the current recruitment processes were functioning across the different states.

### CONSUMER AWARENESS OF OPPORTUNITIES

The Project's survey of 159 staff at Neami found that 53.2% of staff do not believe that the majority of consumers are aware of the CAGs.

At present, most consumers find out about CAG through their support worker.

***"I got approached by my worker and asked to join"*** (Consumer)

Consumers expressed concern about this process:

***"[We need to be] making sure that process is available to everyone, not just certain people"*** (Consumer)

### AN OPEN, ACCOUNTABLE AND TRANSPARENT PROCESS

In order to be inclusive and ensure all consumers know about participation opportunities, diverse methods of communicating information about opportunities are needed.

Consumers expressed that knowing about consumer participation opportunities is important wherever they are at in their own recovery process:

***"I would have liked to have found out on intake, even though I wasn't doing the best, knowing about it and being able to get on it earlier would have helped in my recovery process"*** (Consumer)

At one particular CAG every member except one had been approached and directly asked to join the CAG. Members of this CAG were not aware of consumer participation opportunities before they were approached directly.

## APTITUDE: CRITERIA, APPLICATION & INTERVIEW PROCESS

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The CAG Terms of Reference specify the application process for CAG membership. During consultations the project team observed inconsistencies between states and sometimes within states regarding the application process.

Where it was applied consistently, consumers agreed that the application and interview process was important in helping to feel validated and valued for their skills, enthusiasm and ability. Consumers who experienced inconsistent or partial application processes expressed that they would have appreciated the full application process. All CAG members stated the importance of attracting people with the appropriate skills for the role.

***“Having an application process helps attract committed people and genuine interest”*** (Consumer)

Consumers also expressed the importance of access to adequate support throughout the application process. This was suggested to ensure that anyone with the ability and interest to be on the CAG are able to without ‘level of wellness’ being the primary consideration.

***“Assistance so that anyone who is interested can be supported to be on the CAG”*** (Consumer)

Throughout the consultation period there was discussion about readiness to undertake consumer participation, how to manage levels of wellness and ensuring there are other consumers to step in if people become unwell.

***“Participation and recovery continuum – depends on where you are at in your own recovery continuum as to how involved you get”*** (Consumer)

*Our Consumer Place* talks about the importance of avoiding “levels of wellness” hierarchies, and something that consumers talked about Neami doing well is distinguishing aptitude from levels of wellness.

## PRINCIPLES BEHIND ‘GETTING ONTO THE CAG’

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The principles that the project team derived from the data for this area of enquiry are: *Promoting participation.*

- *Promoting participation* aims to ensure all consumers know what participation opportunities exist, that any interested consumer can apply, that the application process is consistently used and that there is support available when taking on these roles.

## 2. COMMUNICATION

The importance of communication cannot be overstated, especially around having shared and accurate expectations about what consumer participation would involve and what the decision making processes are.

Consumers and staff discussed the importance of communication in terms of:

- Finding out about the CAG on an operational basis, e.g. when it is on, what is on the agenda, notice of meetings and notice of materials
- Information for staff about when the CAG meets, how often, what its function is

- National consistency between CAGs. Ensuring that there is a coordinated approach and that the opportunities for consumers are consistent nationally
- Communication about CAGs with the wider consumer body.
- Communication between CAGs and the Board, communication within CAGs between members, with other community groups and between CAGs and the organisation.

Consumers and staff spoke about how they had experienced a lack of communication in relation to CAGs.

***“In my whole time with Neami I haven’t heard what happens at CAGs”*** (Staff)

Similarly, staff expressed lack of communication as a limiting factor in being able to inform consumers about opportunities:

***“Part of the reason that CAG is often not mentioned by CRSWs seems to be that there is little discussion - it is not often known when CAG rotates membership, what is discussed etc. Would help if CRSWs had more regular updates about CAG specific information”*** (Staff)

Communication is a challenge in any large organisation.

***“There is an opportunity in terms of lines of communication and feeding back information to sites/other consumers”*** (Staff)

Both consumers and staff expressed excitement about the potential to link CAGs in different states to share ideas and activities, with the recurrent suggestion of all CAGs meeting together nationally on a yearly basis.

#### ACCESSIBILITY: READING MATERIALS IN ADVANCE

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Consumers emphasised the importance of having reading materials provided to them in advance, especially complex policy documents:

***“Sometimes at CAG meetings I’m quiet because I’m thinking. I come in here and I don’t know what’s going on because I haven’t been able to read anything in advance. On the spot thinking is hard, especially about complex issues.”***  
(Consumer)

#### NEWSLETTER

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The idea of a newsletter was strongly emphasised in every consultation. Many consumers expressed a desire for a newsletter in order to be informed about consumer participation opportunities and learn about what is happening with consumer participation at Neami. Upon further questioning, the desire for a newsletter stems from the current gap in communication.

***“Right now, we rely on word of mouth”*** (Consumer)

Consumers state that they rely on receiving information from support workers and support workers do not always have the time or information to let consumers know what is happening.

## PRINCIPLES FOR COMMUNICATION

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Communication is vital to every aspect of consumer participation.

The principles that the project team derived from the data for this area of enquiry are: *Neami accountability* and *Accessibility*.

- *Accountability* refers to ensuring that consumers are communicated with in an open and transparent way, and that group members are aware of their role, decision making structures and receive communication regarding every relevant aspect of their role.
- *Accessibility* refers to ensuring that consumers receive materials in a timely manner and are adequately prepared for participation with the resources needed.

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### 3. ROLE AND FUNCTION

The consultations identified a lack of consistency in the understanding of the CAG role between states. In general, consumers expressed a lack of clarity about how CAGs fit into the organisation and what the role is. Significantly, many consumers and staff expressed contrasting views about the main purpose of CAGs.

The perceived purposes of the CAGs identified through first project phase consultations are as follows:

- A focus group: where a group of consumers are asked to provide advice from a lived experience perspective on various projects and activities within Neami. Advisory groups are the official, named purpose of CAGs yet the limitations to this format were highlighted throughout both stages of consultations.
- Avenue for consumer participation and leadership beyond the individual level.
- To serve as a place to develop skills as a pathway to further involvement within Neami, the mental health sector or employment in general.

The last two purposes are largely informal and happen more incidentally rather than arising through planning and deliberate focus on developing consumers' capacity. Consumers strongly express the need for education about the consumer movement. Their interest in leadership development caused frustration that this is not the current purpose of CAGs.

***"I thought the CAG [members] would be bringing things to the table, but it worked in the reverse"*** (Consumer)

## SINGLE POINT CONSULTATIONS

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The CAG membership at present is a group comprised of one consumer from each site. The CAGs meet on a monthly or bimonthly basis to respond to various projects and initiatives within the organisation. The State Manager (in most cases) convenes the groups to seek opinions to ensure the service retains relevance to consumers.

One difficulty that managers expressed with the focus group format is that there is not always enough content to fill the agenda:

***“I struggled to find enough content to set the CAG agenda: it gets set by what’s happening in the organisation. This can’t be set in advance because the organisation is dynamic”*** (State Manager)

Consumers expressed frustration with this, especially when they had ideas and want to contribute to the agenda:

***“In all the time I’ve been on the CAG I don’t think on one occasion the chair has said is there something you want to initiate yourself.”*** (Consumer)

#### DECISION MAKING PROCESSES: THE “RUBBER STAMP”

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Other than the presence of the state manager at most CAG meetings, CAGs are not well linked to any other decision-making structures within Neami. CAG members also reported a lack of feedback about what happens to their input.

***“We’re asked for advice on various projects, with no feedback given. Where does our feedback go?”*** (Consumer)

Another difficulty with the current approach is that it largely involves consumers at the very end of the decision making process.

***“By the time a major decision gets to a CAG it’s too late in the decision making process and all CAGs can really do is give a stamp of approval. Consumers need to be involved at the outset and in strategic planning processes if their input is to be meaningful and actually implemented.”*** (Manager)

In any context it is difficult to make changes to a project late in its development. It was important to examine where in the decision making process consumers should be involved in order to promote genuine participation. The *CPL Report 2010* examined levels of participation and indicated that joint planning is preferable to consumers having a limited capacity to influence a decision making process.

#### OPERATIONAL FACTORS

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The project team enquired about operational aspects of the CAG meetings including the Terms of Reference, the benefit of management presence, who chaired the meetings, who set the agenda and the responsibilities of consumers and the organisation.

The CAGs are not consistently operating to the Terms of Reference. In many cases, consumers and staff were not aware that there was a Terms of Reference. In different states CAG members had different length of tenure, different recruitment processes and different numbers of staff attending. In one State some members had been on the CAG for over two years.

Regarding other operational factors, consumers reported:

- Some consumers would like training to chair the meeting or take minutes and
- Disappointment and feeling unable to contribute to the agenda, but also seeking direction from Neami staff

***“I have seen it work terribly when consumers set the entire agenda and equally as bad when all direction comes from staff.”*** (Peer Support Worker)

Consumers spoke of a desire for more autonomy and agenda setting ability but emphasised that this must be accompanied by training, support and supervision. Consumers conveyed the ideas of partnership and trust:

***“It’s about Neami trusting that when given autonomy and support in equal parts, consumers will set their own agenda with activities that are relevant to Neami’s needs. Where what we want falls outside Neami’s scope, we could be referred to community organisations.”*** (Consumer)

#### STAFF PRESENCE AT CAGS

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The consultations elicited unanimous positive feedback regarding the presence of State Managers, citing that it demonstrates the organisation is committed to CAG and is a link between consumers and decision making processes. The opportunity to learn skills from managers would not usually be available to consumers and was viewed as very beneficial. Consumers spoke positively about managers taking on a mentoring type role in a professional context:

***“Once managers get to know CAG members they can act as referees for future roles.”*** (Consumer)

Consumers and staff gave mixed feedback about the presence of CRSWs at CAG. In some cases where the CRSW role is clear their presence is seen as helpful and in other cases the purpose of their presence is uncertain. Consumers expressed a desire to be consulted and decide about CRSW presence on a case by case basis, ensuring clarity of role.

#### REMUNERATION

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Consumers reported satisfaction with the process of receiving sitting fees. A small number of consumers reported a significant two month delay in receiving payment, and that they did not know who to call to rectify this. Additionally, some consumers requested reimbursement for associated expenses including printing reading materials prior to meetings.

#### COMMUNITY COMPARISON: THE SEARCH FOR “CAG BEST PRACTICE”

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Consultations with other mental health sector service providers and the past experience of Peer Support Workers (PSWs) revealed similar challenges in other settings. These common issues were maintained across clinical services, offender support services, as well as psychiatric disability and support services, both residential and outreach.

The current CAG model appeared to be well suited to Neami in the past. However, Neami has actively engaged in service innovation in recent years, most recently by implementing the Collaborative Recovery Model (CRM). The project recognised that in the interest of

continuing service innovation, a new approach to consumer participation structures is needed.

#### PRINCIPLES BEHIND 'ROLE AND FUNCTION'

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The principles derived from the data for this area of enquiry are: *Clear purpose, Neami accountability and Remuneration and Resourcing.*

- *Clear purpose* refers to a shared understanding between consumers, staff and management about the purpose of all consumer participation endeavours and is perhaps the most important principle that the CAG review project has identified.
- *Accountability* refers to keeping consumers informed about what is happening with their input, how decision making structures at Neami work, and what consumers can expect will happen with suggestions that they make.
- *Remuneration and Resourcing* refers to ensuring that consumers receive adequate payment for their participation, that all payments are timely, and the cost of materials are reimbursed.

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#### 4. SUPPORT AND TRAINING

Training was identified consistently throughout the consultations as a significant gap. Most CAG members had not experienced any formal training at all while others had access to varying levels, mostly informal.

The one CAG that had recently accessed formal training made the same suggestions around their needs as those who had not experienced any training at all.

#### TIMING OF TRAINING

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Consultation with consumer movement experts revealed that training should be an ongoing, individualised, needs-based process. This is in line with the CRM and the coaching style adapted by Neami in recent years.

***“There needs to be layers of training – initial orientation, then ongoing training and context. When you first start a job you often don’t know what you don’t know.”*** (Consumer movement expert)

This is especially true of people from diverse backgrounds and those who may not have worked in an office environment before or may not be familiar with technology, policy, organisational culture etc.

#### MENTORSHIP

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The need for mentoring was the most significant and consistent training theme identified by consumers and staff.

When discussing who would be best suited to act as CAG mentors, experienced CAG participants was the most common response followed by PSWs. There was a particular emphasis on mentoring by people who had lived experience.

## COACHING

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CAG members identified two aspects of coaching they needed to perform their role effectively. The first was support to develop skills and be given guidance to contextualise the consumer's role within Neami.

***"We want to know where Neami is going next and how we can help"*** (Consumer)

The second and critically important component of coaching is support to maintain a consumer perspective and avoid the consumer point of view being appropriated or changed. This places emphasis on the consumer perspective as a field of expertise in and of itself, and the importance of maintaining that perspective:

***"CAG members should have regular peer supervision, otherwise it is possible to lose perspective."*** (Consumer)

Some CAG members expressed interest in receiving training in group peer coaching so that they would be able to support each other.

## MENTAL HEALTH SYSTEM

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Consumers unanimously stated that they would have benefited from training about Neami as an organisation, the PDRS sector, the broader mental health service system and opportunities within the consumer movement.

***"What else is available in the consumer movement? How else can we be involved? We would like education about local CAGs, NSW CAG, Our Consumer Place and Peer Support."*** (Consumer)

Consumers expressed a desire to participate in systemic advocacy, but did not know how to go about it. When asked, consumers in almost all states were unaware of local opportunities to participate in the consumer movement such as NSW CAG, VMIAC, and local clinical CRGs/CAGs.

In one CAG consult, staff members expressed that they did not know where to refer consumers who wanted to participate in the consumer movement.

## TRAINING FOR STAFF

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Consumers emphasised that educating staff, especially CRSWs about consumer participation is very important to ensure that consumers get the necessary information.

## PRINCIPLES FOR SUPPORT AND TRAINING

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The principles that the project team has derived from the data for this area of enquiry are: *Training and Coaching*.

- *Training and Coaching* refers to ensuring that every consumer involved in participation receives relevant training and that this need is reassessed on an ongoing basis.

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### 5. AFTER THE CAG

The project gave consideration to possible pathways after consumers had finished their time on the CAG.

## EXIT PLANS

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One CAG was looking into developing exit plans for CAG members, with links to pathways as identified by the needs of the individual.

***“There could be formal pathways into other forms of employment in the mental health field, or training to learn transferable skills”*** (Consumer)

## LINKING TO COMMUNITY OPPORTUNITIES

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Consumers in all CAGs expressed a need to know more about the consumer movement and opportunities beyond CAG. Staff reiterated this need:

***“Both staff and consumers need more information about what opportunities are available in the consumer movement. Staff don’t know where to refer a consumer if they express a desire to participate in consumer movement activities beyond Neami CAG”*** (Staff)

## LENGTH OF TENURE/SENIOR CAG ROLE

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The current length of tenure for CAG members is inconsistent throughout the CAGs. For example, some CAG members had stayed on longer than the two year specified in the Terms of Reference. CAG members and Neami staff expressed trepidation about CAG terms ending:

***“I don’t want it to end”*** (Consumer)

***“We don’t want to throw them away”*** (State Manager)

A number of consumers expressed the idea of increasing the length of tenure on CAG to three years in order for experienced members to mentor newer ones.

***“The two year term is good - but there should be more meeting opportunities. A member from each CAG could take on the role of ensuring meetings, agendas, speaking opportunities are available and CAG is promoted.”*** (Consumer)

***“There could be a CAG leader”*** (Ex-CAG member)

## PRINCIPLES FOR 'AFTER THE CAG'

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The principles that the project team has derived from the data for this area of enquiry are: *Community pathways* and *increased consumer participation opportunities*.

- *Community pathways* refers to ensuring that there is a referral process in place for consumers who are interested in taking the skills learnt through their participation at Neami out into the community.
- *Increasing consumer participation opportunities* within Neami to build on the skills of ex CAG members and enrich the organisation. This broader principle is discussed separately in the recommendations section of this report.

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## PRINCIPLES FOR CONSUMER PARTICIPATION

The principles elicited from the consultation data are linked to Neami's values in *Figure 1*, as outlined in the 2009 Neami Policy Manual. The areas of focus are a 'vision' that explain the actions and activities that demonstrate these principles.

Figure 1: Principles for Consumer Participation

PRINCIPLE	VALUES	AREA OF FOCUS
Clear Purpose	Respect, Self Determination	<ul style="list-style-type: none"> <li>All consumer participation has a clearly defined purpose, with consumer involvement in defining purpose where possible</li> <li>All participation is specific, time-bound and attainable, with adequate support provided to consumers and staff</li> </ul>
Training and Coaching	Learning, Growth	<ul style="list-style-type: none"> <li>All consumers receive needs-based training, regular coaching, support from mentors and regular reassessment of need</li> <li>All consumers involved in participation structures have opportunities to develop their aptitude</li> </ul>
Remuneration and resourcing	Respect	<ul style="list-style-type: none"> <li>All consumers are reimbursed for their time and materials, e.g. stationery, at home reading time</li> </ul>
Accessibility	Acceptance of diversity, Empowerment Wellbeing, Hope	<ul style="list-style-type: none"> <li>Logistical needs are provided for: e.g. transport, adequate notice of meetings</li> <li>Receipt of reading materials in a timely and accessible manner to allow for adequate preparation</li> <li>CALD appropriate materials and provision for any disability</li> </ul>
Neami Accountability	Change, Quality, Partnership	<ul style="list-style-type: none"> <li>Consumer involvement in decision making and participation is clearly linked to decision making structures</li> <li>Regular and transparent communication with consumers around every aspect of their role.</li> <li>Consumers receive timely feedback about actions arising from their input</li> </ul>
Community pathways	Growth, Choice, Self-determination	<ul style="list-style-type: none"> <li>Presence of pathways for consumers to take on roles beyond Neami</li> </ul>
Promoting participation	Empowerment, choice	<ul style="list-style-type: none"> <li>All consumers know about consumer participation opportunities: their existence, their criteria and that support is available</li> </ul>

## PHASE ONE WRAP-UP: WHY DID WE NEED A SECOND PHASE WITH A NEW FOCUS?

The first phase of the project consultations clearly demonstrated Neami's strong history of consumer participation and explored the organisational culture around consumer involvement. It was found that Neami staff across all levels highly value and are committed to consumer participation. Currently CAGs are the main way that consumers participate at Neami beyond individual service delivery. The project has identified that many consumers benefit greatly from being CAG members, often gaining confidence, skills and using the CAG as a stepping stone to other roles. CAGs have also had purposeful and productive input into a number of initiatives at Neami.

The most significant finding of the first phase of the project was that the purpose of CAGs is ultimately unclear and that consumers, managers and service delivery staff had different views about the main role of CAGs. The perceived purpose and activities also differs across states. This appears to be the main reason why the CAGs are not operating in accordance with the Terms of Reference.

The first phase also noted that consumers are not involved in high level decision making at Neami, in areas such as strategic planning and implementing components of the strategic plan, or at the service planning level.

Throughout the first phase of consultations, the paradigm of the project was that the current CAG structure and role would essentially remain the same and the review would result in recommendations for improvement. To this end, the project successfully analysed the first phase consultation data and developed principles for how the current structure could be improved. The project team recognised however that there was also a broader picture. It became apparent that the scope of the project broadly incorporated consumer participation beyond the CAG.

A key point of reflection was that the data from the *CPL Report 2010* was virtually identical to the first phase of data from the current CAG Review Project. The CAGs still shared the same achievements and the same struggles as they did in 2010 and in previous years, because nothing substantive had changed. The primary issue is that CAGs purpose was ambiguous. The main role of CAGs needed to be clearly identified through a parallel process involving consumers and Neami as an organisation.

## PHASE TWO: A NEW ROLE AND STRUCTURE FOR CAGS

The second phase of consultations explored the purpose of CAGs and identified two key themes:

- All parties consulted stated that CAG should have more decisional power and be integrated into the decision making structures in Neami;
- Parties consulted also expressed the concept of leadership development as a pathway to recovery.

## 1. CLARIFYING THE ROLE OF CAGS

The project team sought guidance from the CEO, members of the CAGs, staff and the consumer movement to gain input about Neami's direction as an organisation. The focus of phase two was how best to integrate consumer's aspirations for their own participation with the interests of the organisation and what a shared vision for the future of CAGs might be. The CEO expressed an interest in increased levels of consumer participation, including at the service development and strategic decision making levels.

***"Having consumers drive the strategic directions will create more buy in from staff."*** (CEO)

The project survey about CAGs asked staff to rank the perceived current purpose of CAGs followed by the ideal purpose. The options provided derived directly from the stated roles and functions that arose from the phase one consultations with CAG members, staff and experts from the consumer movement.

Figure 2: Difference in Staff Opinion on Perceived and Ideal CAG Role

Function	Currently	Ideally	% Difference
Social interaction	26%	14%	12% Decrease
General skill development	42%	29%	13% Decrease
Service planning	80%	93%	13% Increase
Leadership skill development	48%	59%	11% Increase

The responses in *Figure 2* indicate that service planning and leadership are seen as important areas of development for any new CAG structure.

## DECISIONAL POWER

As previously reflected during the analysis of the role and function of CAGs, much of the tension within the current CAG structure was due to the perception that CAG is often used as a "rubber stamp".

When asked if *'it is important for Neami to have consumer participation at a service planning and development level'* in the staff survey, 97.9% of participants responded as agree or strongly agree. This demonstrates how greatly consumer participation at a high decision making level is valued among staff at Neami.

As discovered in phase one through consultations with other services and the experiences of PSWs, shared decision making at strategic levels is relatively uncharted territory for the PDRS sector and the mental health sector in general. For this reason, the team sought input from expert consumers involved in the consumer movement as well as referring to consumer and leadership literature.

## LEADERSHIP: A NEW DIRECTION FOR CONSUMER PARTICIPATION

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Throughout the project consultations, consumer movement experts identified that for empowerment and citizenship to occur, there needs to be consumer participation beyond the individual level.

***“Leadership is about consumer participation beyond the individual level: at the systemic level”*** (Consumer movement expert)

Leadership describes the capacity to contribute to and influence decision-making. The project team identified leadership as a key purpose for consumer participation and sought to explore what leadership roles consumers could take on within Neami. In particular, bringing staff and consumers together in partnership to operationalise Neami’s Strategic Directions would be a source of innovation.

***“We have strategic directions rather than a dictated plan - means that Neami can operationalise with flexibility and in a fluid way – means that consumers can be involved”*** (CEO)

***“[We want to] be consulted, be heard and see some form of change.”*** (Consumer)

## REVIEW OF LEADERSHIP LITERATURE

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In order to gain a deeper understanding about leadership and the consumer movement, the project team conducted a review of the key leadership literature. The findings in the literature revealed that in many ways Neami is already supporting consumers to become leaders within their own lives by focusing on empowerment, self determination and autonomy. Much of the literature on consumer participation however, argued that empowerment is best achieved for an individual if they have access to opportunities to influence systemic issues. This added a further impetus to involve consumers in high level decision making structures at Neami.

## CONSUMER MOVEMENT CONSULTATION

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Through discussion with prominent consumer experts the project identified that consumer leadership is viewed as best practice for genuine participation. Consumer experts spoke of leadership as a priority and the importance of support and training so that people were not “set up to fail” and are equipped for decisional power. Focusing on developing leadership skills that could be transferable to any sector emerged as the way to achieve this.

Consumer experts also emphasised the reality of systemic and societal power inequalities and the impact this has on the capacity of the consumer movement to organise and develop leadership skills. Lived experience of recovery is a rich area of expertise that historically has not been recognised, resourced or given power and yet is a source of profound innovation.

## THE CHALLENGE OF CHANGE

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The project had explored the challenge of creating shared power through partnership. Consumer movement experts conveyed the importance of Neami being prepared internally for consumers taking on new roles and beginning to share organisational power:

***“Taking consumer involvement to the next level and new heights, and making sure Neami policies and culture reflect the changes”*** (Expert in the Consumer Movement)

Additionally, it was observed that the presence of a project team interacting with CAGs and management was an impetus for change. Most of the CAGs decided to undergo some improvements as a direct result of the project team presence and discussions brought about by the current project e.g. VIC CAG is holding an end of year planning day.

## AVOIDING A NET LOSS OF CONSUMER PARTICIPATION OPPORTUNITIES

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The clear intention behind moving forward with a new, clear role for the CAG was that consumer participation will be enhanced, and no opportunities removed. The desire was to create an overall benefit across the organisation for staff and consumers.

***“Not taking away anything with this change to CAGs – a process of improving what we already have”*** (CEO)

Although the scope of the project did not include reviewing consumer participation at the service delivery level, it was recognised that another important tier of consumer participation is involvement in service planning at the site level. This has not been addressed by the current project team but requires exploration.

## FINANCE

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Currently there is no separate or specific funding allocation to CAGs and costs are expended against the site budget. Expenditure is allocated from several different budget lines including consumer advice, meeting costs, catering, travel and is not always attributed to CAG. However, a close approximation of current spending is \$20,000 annually across the organisation, which is allocated primarily to sitting fees.

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## 2. DEVELOPING LEADERSHIP

The project team sought to explore what the term ‘leadership’ means to current CAG members and explore some of the thoughts that staff, consumers and management had about what leadership is.

***“Leadership is about taking a risk, having a vision, resilience, working hard and overcoming obstacles.”*** (CEO)

The literature around leadership development emphasises that good leaders have often risen above personal challenges, learnt from their personal hardships and come out the other side with a better understanding of their values and strengths and the capacity to

motivate and inspire others. In many ways, this process correlates to the CRM and the recovery journey in general, putting Neami consumers in a prime position to develop their skills as leaders.

***“There are already leaders on the current CAG – maintain and mentor current leaders on the CAG”*** (Ex CAG member)

Throughout the consultations, a number of leadership development programs, initiatives and courses were mentioned in consultations. These were compiled and can be found in [Appendix 1](#).

## CONSUMER WORKERS

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Both the consultations and the survey highlighted the belief held by staff that having more consumer workers would boost consumer participation within Neami. In particular, staff spoke of the benefit of Peer Support Workers.

***“PSWs changed the way we work”*** (CRSW)

***“We should have at least two Peer Support Workers at each site who do more than just Flourish”*** (CRSW)

A number of people recruited by Neami had previously served on a CAG. Some hesitation was expressed during the consultation period about offering consumers opportunities that are solely based within the mental health service system. This was described as wanting to avoid creating “professional consumers”.

## THE “PROFESSIONAL CONSUMER” NOTION

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One of the key roles Neami plays in the life of consumers is helping people to establish an identity beyond mental illness. It has been expressed by some that educating CAGs only about opportunities within the mental health system and the consumer movement may lead to a fusion of identity with illness.

Consumer workers who were asked to comment on this notion believed that it is empowering to be employed based on their recovery experience.

***“Some of us will choose to move on away from the mental health field, some of us will choose to build a future within it and this may be a vital part of recovery”***  
(Consumer)

***“In helping others I help myself”*** (Consumer)

Consumers conveyed that lived experience of recovery is a unique and valuable area of expertise, and that like any career path, people may choose to move away from it as they develop interests elsewhere.

## GENERAL SKILL DEVELOPMENT – DOES IT HAPPEN?

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CAG is often cited as a way for consumers to build their skills and confidence. While most consumers agreed that being on the CAG helped to increase confidence, the skill development opportunities within the current CAG structure appeared to be limited to general meeting skills (e.g. minute taking, chairing, etc). Skill development opportunities were not consistently offered to consumers.

Consumers strongly expressed a desire to learn skills that would be transferable to other environments, with the most common suggestions being linked to the consumer movement and consumer initiated projects within Neami and the mental health system.

## CONSUMER INITIATED PROJECTS

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CAG members across all states were enthusiastic about initiating and leading projects. Staff responses echoed these suggestions. In some CAGs, this was already happening to a certain degree.

***“I don’t know if there are roles for CAG members beyond the CAG ...CAG may be able to take on extra projects and if there is funding etc then this should be able to happen”*** (Consumer)

Consumers indicated interest in participating in varied activities, including:

- Writing CAG or consumer newsletters
- Organising a consumer conference
- Initiating and leading research
- Developing a social firm
- Mentoring new CAG members
- Community awareness activities aimed at reducing stigma
- Education of clinical services aimed at reducing stigma
- Writing letters to parliamentarians around issues that effect people with a mental illness (e.g. no smoking in psychiatric wards)
- Making Neami more accessible on the internet
- Site based group planning
- Being involved in staff training, which was echoed by staff:

***“Consumers should be involved in our training beyond the token telling of their story”***  
(Staff)

## CAG AS A STEPPING STONE

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There was a general consensus from both staff and consumers that the CAG was seen as a stepping stone for consumers. In all consultations, becoming a Peer Support Worker was suggested as a next step for CAG members. Interestingly, it was also the only suggestion. While this is one possible option, it should be noted that CAG does not develop the specific skills necessary for Peer Support. The focus of CAG is on service development, whereas Peer Support roles generally sit in within the service delivery area. This indicated the need for

more education, opportunities and skill development related to the individual's goals and emphasising a diverse range of future pathways.

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#### PHASE TWO WRAP-UP: LEADERSHIP THROUGH PARTNERSHIP

The project team used Neami's vision, mission and values as a framework for understanding the purpose of engaging consumers at a higher decision making level. Facilitating leadership development and participation at decision making levels would enable consumers to give back to Neami for a time before moving into the community of their choice. Consumers and staff suggested that mentorship, links to the consumer movement and skill development would not only benefit Neami but the wider community, resulting in empowerment and a sense of citizenship for consumers.

In compiling the recommendations and 'visioning' a new structure for consumer participation, the project team examined the needs of the relevant parties. Neami has expressed a desire to involve consumers in the implementation of the Strategic Directions and at a service planning level. Consumers have emphasised the importance of planning their own programs, building connections with their community and developing skills and competence necessary to enjoy a full and rich quality of life. The project team has identified leadership development, task specific focus groups and involvement at high decision making levels as key purposes, and proposes several new structures to replace CAGs.

## RECOMMENDATIONS: A MODEL FOR THE FUTURE

### SUMMARY OF RECOMMENDATIONS

The project recommendations are summarised as:

#### RECOMMENDED CONSUMER PARTICIPATION STRUCTURES

- Apply the 'principles for participation' included in this report to all future consumer participation activities
- Phase out CAGs in their current form and develop new structures and resources to support enhanced consumer participation
- Involve current CAG members in the development of new structures
- Explore options around a leadership development program, including mentorship
- Ensure consumer involvement is integrated into all Strategic Directions implementation and other task specific working groups and/or projects
- Explore possibilities for consumer involvement in service planning
- Review consumer participation structures on a regular basis

#### SUPPORTING THE NEW STRUCTURES

- Update the consumer participation policy
- Implement an ongoing communication strategy to support consumer participation
- Ensure adequate induction and training for staff that outlines the new structures

#### RESOURCES

- Ensure adequate funding is allocated to resource consumer participation
- Extend the current project to explore feasibility and implement the recommendations
- Review the need for ongoing consumer participation management

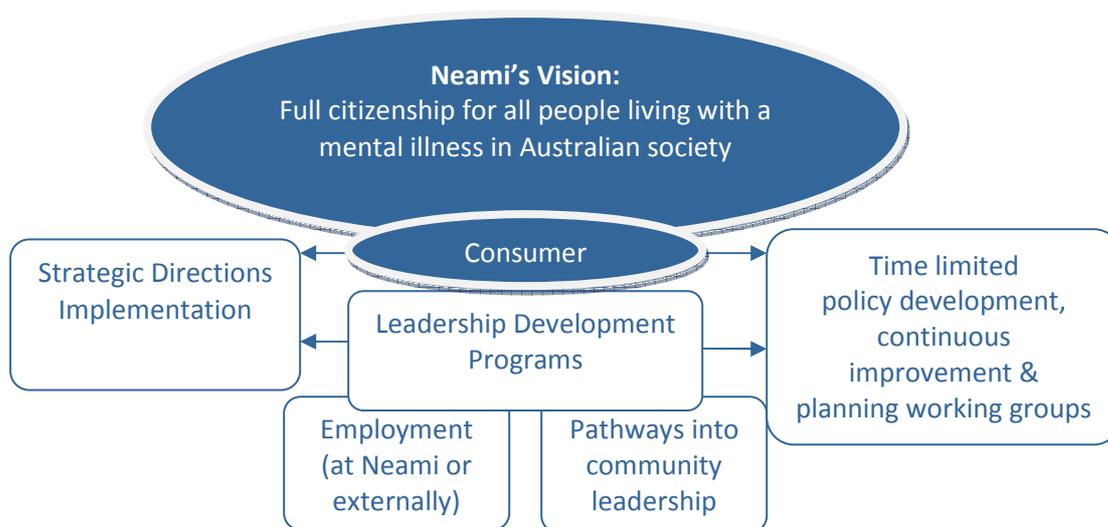
The report then includes an implementation plan and a communication strategy.

## RECOMMENDED CONSUMER PARTICIPATION STRUCTURES

It is recommended that all future consumer participation activities are practised in line with the principles developed in the first phase of consultations.

Figure 3 outlines the proposed new structure and demonstrates how it relates to Neami's vision statement.

Figure 3: Proposed Structure for Consumer Participation at Neami



Full citizenship involves consumers having the ability to participate in decision making at both an individual and organisational level. Through implementing these changes, participants will be able to engage as full citizens within the community of their choice.

### LEADERSHIP DEVELOPMENT

It is recommended that the current CAGs are phased out and new leadership development programs are set up. It is important that current CAG members are consulted about the introduction of leadership development programs. Operationally, the leadership development programs should be:

- Region or state based
- At least one member from each Neami site
- Convened by state managers: run in partnership with consumers
- Ongoing training covering the following:
  - Mental health service system
  - The Consumer Movement
  - Neami as an organisation
  - How to implement strategic directions within an organisation
  - Group planning & facilitation
  - Other training as deemed necessary and relevant
- Linked to the community
- Professional development planning for participating consumers

- Joint decision making in relation to expenditure (e.g. consumers and staff work in partnership to prioritise training costs)

## MENTORSHIP

It is recommended that a mentorship program is established where each new leadership development group member is assigned a mentor to assist them through their first year of involvement.

- It is important that mentors have a lived experience of a recovery journey
- Mentors need to be supported to learn the skills required to be an effective mentor
- Previous experience within a Neami CAG, or other consumer participation would be considered an advantage when appointing mentors.

## STRATEGIC DIRECTIONS IMPLEMENTATION

It is recommended that NLT ensure there is consumer involvement in all working groups associated with the implementation of the 2011 -2014 Strategic Directions.

- Consumers should be recruited from the state based leadership development bodies through an application process that assesses aptitude.
- The NLT would initiate working groups and subcommittees where required to implement specific tasks identified from the Strategic Directions.
- The long term goal is for consumers to become equipped to participate in the planning of the future 2015 – 2018 Neami Strategic Directions.

## TASK SPECIFIC WORKING GROUPS

The project team emphasises that in all of Neami's activities, the edict "nothing about us [consumers] without us" should apply. Where consumer feedback, input or leadership is called for within Neami, the following is recommended:

- Task specific, time limited groups
  - To be formed at the inception of a project
  - Genuine partnership of consumers and upper level management/service delivery staff.
- Each internal working group should include a minimum of two consumers.
- Membership for consumers in these groups should be by application and members of the leadership development group should be encouraged to apply.
- Consumers receive supervision and training as necessary.

## CONSUMER PARTICIPATION IN SERVICE PLANNING

It is recommended that further exploration examining consumer participation at the service planning level occurs.

## REGULAR REVIEW OF CONSUMER PARTICIPATION STRUCTURES

It is recommended that the structures that replace CAGs are reviewed every 12 months.

## SUPPORTING THE NEW STRUCTURES

### CONSUMER PARTICIPATION POLICIES

The consumer participation and CAG policies should be updated to include:

- An outline of consumer participation structures including the leadership development program and task specific working groups
- Principles for consumer participation

### COMMUNICATION

The recommended communication strategy is outlined as follows:

- Staff should be regularly informed about the consumer movement and consumer participation opportunities within Neami.
- Localised resource kits are created that outline opportunities for consumers to participate in the wider consumer movement.
- A booklet is created for all consumers that explains consumer participation and leadership development opportunities at Neami, given at intake.
- Consumers are informed of participation opportunities on a routine basis at file audits and through an opt-in newsletter.

### CONSUMER PARTICIPATION DATABASE

It is recommended that Neami establishes a database that records consumer skill and interest, providing a ready 'pool' of consumers. The database would enable efficient coordination of recruitment for consumer led projects and help ensure the process is equitable. Suggested fields to include are:

- Contact details
- Preferred contact method
- Neami site
- Skills/experience
- Interests (e.g. interview panels, policy feedback, leadership development, strategic directions implementation group etc)
- Skill development plan

This could be as simple as a standard volunteer database, or fields added to Carelink.

### TRAINING FOR STAFF

It is recommended that staff receive training about consumer participation and the consumer movement at induction and on an ongoing basis as necessary. Consumers should be involved in delivering this training.

## RESOURCES

### FINANCE

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The proposed leadership development program and task specific focus groups need to be allocated adequate funding. The budget should take into account the following:

- Payment for consumer and staff time
- Travel and catering where appropriate
- Out of pocket expenses
- Training
- Mentorship
- Other associated costs eg newsletters

### TRANSITION PROJECT & ONGOING CONSUMER PARTICIPATION MANAGEMENT

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It is recommended that a 1.0EFT project team is formed, or the current project is extended, to implement the outlined recommendations and conduct a feasibility study. The length of the project should be six months with review in June 2012.

The scope of the project would include:

- Exploring the feasibility of a leadership development program including detailed costing;
- Facilitating the transition in which CAGs are phased out and leadership development programs and task specific focus groups are developed;
- Consulting with current CAG members regarding their input to the changes;
- Facilitating partnership with community organisations, including pathways into roles beyond the mental health sector (see [Appendix 1](#) for suggested leadership development services);
- Ensuring adequate support and training is provided to consumers;
- Implementing the Principles for Consumer Participation.

As the transition project team ceases, an assessment can be made about the nature of the ongoing workload associated with the new structures and the level of staffing and resources required to support them. It is recommended that any new staff appointments related to consumer participation have a lived experience of recovery.

The workload for an ongoing position or positions to support the new structures may include:

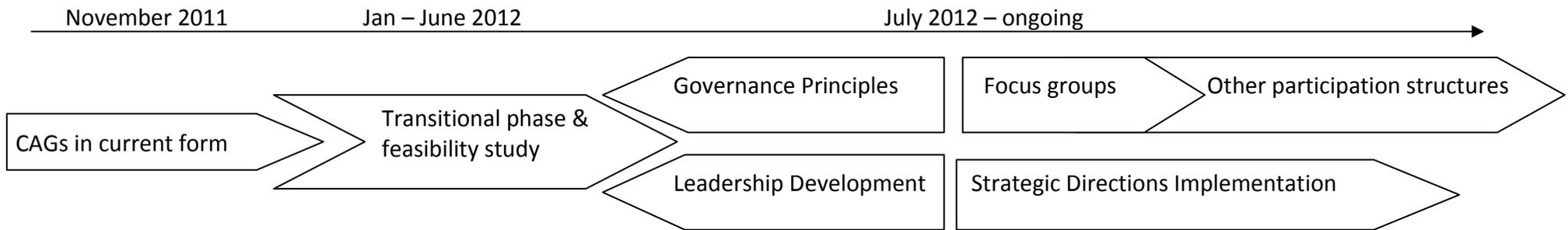
- Coordinating consumer participation projects, including leadership development
- Group coaching for participating consumers from a lived experience perspective;
- Communication between states to ensure national consistency;
- Liaising with service development regarding what focus groups are needed;
- Liaising with the NLT;
- Managing consumer skill development plans;
- Producing consumer participation communication materials as needed;
- Reviewing the new structures and ensuring they meet their intended aims.

IMPLEMENTATION PLAN

Planned Action	Tasks	Rationale	Timeframe	Outcomes
Engage an Implementation Project Team (1.0EFT).	Continue current project / engage different team members if necessary	Facilitate phasing out CAGs and developing new structures	Jan-June 2012 June 2012 review	National coordination of implementation; ensuring recommendations are carried out
Phase out CAGs	<p>Meet with existing CAG members and explain transition, including in writing</p> <p>Exit and transition planning:</p> <ul style="list-style-type: none"> <li>Exit plans for consumers who aren't interested in the new structures</li> <li>Identify consumers who want to take on a mentoring role</li> </ul>	<p>Involve CAG members in the transition process</p> <p>Ensure a smooth transition for CAG members into new structures and a role of their choice</p>	January – June 2012	<p>CAG members are consulted and prepared</p> <p>Pathways to community participation are provided</p> <p>Mentors are available for the commencement of the mentorship program</p>
Allocate funds in June 2012 budget	Leadership development and focus group components are identified, prioritised and funded.	Implementation Project will clarify expenditure requirements	June 2012	Consumer participation structures are adequately funded and resourced
Develop consumer participation organisationally	<ul style="list-style-type: none"> <li>Identify consumers interested in participation at file audit</li> <li>Develop consumer database</li> <li>Develop mentorship program</li> </ul>	<p>Assess the level of interest: will inform level of promotion needed</p> <p>Access to an accurate record of available and interested consumers</p>	<p>June - Jan 2013</p> <p>2012 March &amp; Oct file audits</p>	<p>Everyone involved in the new structures has appropriate aptitude and interest</p> <p>“Opt in” database of interested consumers</p> <p>Equitable recruitment processes</p>

<p>Organisational Transitional Phase</p>	<p>Implementation Project Team engages with staff and managers to facilitate transitional period</p> <ul style="list-style-type: none"> <li>• Train staff regarding new consumer participation structures and the consumer movement at induction and staff meetings</li> <li>• Create resource kits</li> </ul>	<p>Create a safe 'space' for the new leadership development program to occur</p> <p>Ensure that there is a shared organisational understanding of the purpose of this new structure</p> <p>Resource kits assist with exit planning and connects consumers to their communities</p> <p>Ensures staff know where to refer consumers</p>	<p>Jan 2012 – Jan 2013</p> <p>Jan 2012 – Jan 2013</p>	<p>Staff and managers “buy in”, understand purpose, value it and actively promote it</p>
<p>Implement new structures</p>	<p>Pilot leadership development projects and set up task specific focus groups</p> <p>Commence Strategic Directions Working Group</p> <p>Update policies and implement communication strategy</p>	<p>Involve consumers in strategic decision making</p> <p>Organisational documentation supports changes</p>	<p>Pending review and progress</p>	<p>Consumers participate in high level decision making</p> <p>Staff, consumers and management aware of new structures</p>
<p>Engage a National Consumer Participation Manager (1.0EFT)</p>	<p>Create position description for 'National Consumer Participation Manager' and recruit</p> <ul style="list-style-type: none"> <li>• Updates resource kits and regular newsletters</li> </ul>	<p>Assist with increased workload; bring a lived experience perspective</p>	<p>July 2012 – ongoing (pending review)</p>	<p>Nationally consistent and adequately resourced leadership development programs</p> <p>Consumer participation has adequate organisational focus and respect</p>

IMPLEMENTATION TIMELINE



COMMUNICATION STRATEGY

Audience	Purpose	Message	Medium	Outcome
Consumers	Inform about opportunities; foster awareness and empowerment	Inform consumers about the participation opportunities at Neami, the application process, resources available and who to ask for help	Intake information booklet; CRSW face-to-face conversations; Written communication; website	All consumers are aware of opportunities
CRSWs	Inform frontline workforce	Consumer participation is a vital part of Neami. It should be explained and offered to all consumers regularly.	Staff meetings, induction training, policy, intranet	CRSWs understand and prioritise consumer participation
Senior Practice Leaders	Ensure that managers and SPLs are equipped to inform CRSWs of relevant information	Advise of recruitment dates and available positions for consumer participation	Fortnightly management meetings	SPLs and Service Managers are equipped to inform and assist CRSWs
Service Managers		Advise of current working groups and who to ask for help if needed	Memos from state or regional managers	
Regional Managers	Run program in partnership with consumers and communicate joint plans	Advise of current activities and events	Fortnightly management meetings	Managers run programs in partnership and are committed to consumer participation
State Managers		Advise of recruitment dates and spaces available	NLT	

## CONCLUSION

The CAG review project initially set out to identify and “fix” operational issues within the CAGs at Neami. Based on the results from the first phase of consultations, a set of principles for consumer participation was developed. Implementing these principles is a key recommendation that will enhance consumer participation at Neami.

The key finding of the project was that the most important principle of consumer participation is clarity of purpose. The team examined the reasons behind consumer participation and it became apparent that this project was not just about CAGs at Neami, but consumer participation and leadership more broadly. The project recommendations centre on developing consumer leadership as a way of ensuring genuine participation and carrying out Neami’s vision statement of full citizenship for people with a mental illness.

It is anticipated that by implementing the recommendations within this report Neami and consumers will work together in genuine partnership, creating leading and innovative consumer participation practices within Neami.

## APPENDIX ONE: LEADERSHIP DEVELOPMENT: EXISTING FRAMEWORKS

Throughout the project consultations, a number of external leadership opportunities were mentioned by consumers and staff. The following is a list of these organisations and frameworks, provided as a resource for future partnerships and/or community links for consumers.

For a more comprehensive list of leadership development opportunities, both nationally and state based, please see: <http://www.ourcommunity.com.au/leadership/>

### GENERIC LEADERSHIP PROGRAMS (NOT RELATED TO HEALTH):

#### **Leadership Plus:**

Run a flagship annual program that provides comprehensive leadership training with a practical component. Additionally, Leadership Plus can organise custom training sessions for specific audiences with content appropriate to the organisation's needs, eg. implementing Strategic Directions.

More information: <http://www.leadershipplus.com/>

#### **Innovative Practice:**

Ran a Consumer Leadership development programme in conjunction with the Victorian Quality Council

More information: <http://www.innovativepractice.com/>

#### **Leaders for Tomorrow:**

Funded by FaHCSIA

- National, no cost leadership development for people with a disability (specifically NOT a mental illness)
- Includes a two day retreat, costs for conferences and/or courses, mentorship, development of leadership plan and graduation.
- 12 months
- 5 intakes, with the last being in mid 2013
- More information: <http://www.leadersfortomorrow.com.au/>

#### **Roarhouse (VIC)**

- Provide (among other things), training in events management and radio broadcasting to consumers
- More info: <http://roarhouse.squarespace.com/>

#### **Mission Australia** (Available in NSW, SA, Qld, Vic and WA)

- "Catalyst Clemente Program"
- For people "experiencing significant life challenges"
- Offers University level humanities subjects over 12 weeks in a community setting
- Combines education with social support
- Accredited, after 4 subjects are completed, participant receives a certificate that can be transferred to credit in a tertiary qualification

- Each participant is assigned a “Learning Partner” who helps the person to organise their work and develop study skills. Partner may not be experienced in knowledge of that particular subject, so is not a tutor.
- More info: <http://www.missionaustralia.com.au/community-services/1612-catalyst-clemente-program>

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#### LEADERSHIP OPPORTUNITIES SPECIFIC TO THE MENTAL HEALTH SECTOR:

##### **Health Issues Centre (Vic):**

- Nationally accredited consumer leadership course
- Also offer a Vocational Graduate Certificate in Consumer Engagement
- Health Issues Centre also has a database of consumers with experience of various different health issues who sit on committees, panels and working groups throughout the health sector.
- More information: <http://www.healthissuescentre.org.au/home.shtml>
- Phone: 9479 5827

##### **NSW Institute of Psychiatry:**

- 3 day consumer advocacy course
- Training around advocacy, human rights, justice, representation “and a whole lot more”
- Price is accessible for people on DSP
- 3 day extension course if enough participants want to continue
- More info: [http://www.nswiop.nsw.edu.au/index.php?option=com\\_content&view=category&layout=blog&id=85&Itemid=88](http://www.nswiop.nsw.edu.au/index.php?option=com_content&view=category&layout=blog&id=85&Itemid=88)
- Phone: (02) 9840 3833

##### **Our Consumer Place:**

- Online resource centre run by people with lived experience
- One-two monthly newsletters
- Info, support, resources and training for consumer groups, info on consumer events and links to many other sites and resources relevant to the consumer movement
- More info: <http://www.ourconsumerplace.com.au/index>

##### **Uniting Care: Prahran Mission: Hearing Voices (Vic):**

- Various trainings offered at very cheap rates for consumers such as:
- Peer Support
- “Facilitating Hearing Voices” groups and workshops to support facilitators
- Understanding trauma
- Most courses offered to both health professional and consumers
- Also hold a conference yearly (bi-annually?)
- More info: <http://www.prahranmission.org.au/training>
- Tel 03 9692 9500

##### **Self Advocacy Resource Unit (Vic):**

<http://www.saru.net.au/>

**Mental illness Fellowship South Australia (in conjunction with Baptist Care SA):**

- Intro to Peer Work course, free, 6 day training runs four times a year
- Mentoring after the job to help find a job, mentoring can continue once the person secures employment as a PSW
- Also offer group PSW meetings
- Also offer mental health first aid training
- Provided training for our SA CAG
- More info: <http://www.peerwork.org.au/>

**DARU: Disability Advocacy Resource Unit (Vic)**

<http://www.daru.org.au/index.shtml>

**NSW CAG**

<http://www.nswcag.org.au/>

**Beyond Blue: Blue Voices**

- Email database of consumers who wish to participate in online research, community education and systemic change
- Those who do face to face projects (eg; sitting on a committee or telling their story to the media) are given extra training and remunerated for their time
- More info: [http://www.beyondblue.org.au/index.aspx?link\\_id=104.1006](http://www.beyondblue.org.au/index.aspx?link_id=104.1006)
- Phone: 03 9810 6100, contact; Bonnie Vincent

**Health Consumer's Alliance (SA)**

- <http://healthconsumer.org/>

**MIFSA/Bapticare:**

- Provide training in Peer Support
- <http://www.peerwork.org.au/>