CIVICA

Current practice in NHS foundation trust member recruitment and engagement

2011

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Contents

An electronic version of the full 54-page report can be obtained by contacting us; our details can be found at the end of this Executive Summary booklet.

Executive summary

Background

This joint report from Monitor, Electoral Reform Research and Membership Engagement Services provides information on the current state of play in NHS foundation trust member recruitment and engagement and examples of what trusts have found to work well, and less well. As such, it is aimed at chairs, board secretaries, membership and communications teams and governors of both existing and aspirant foundation trusts.

The report summarises the findings of a survey of NHS foundation trusts and case study research conducted between November 2010 and January 2011. The 131 foundation trusts authorised as at 1 October 2010 were included in the survey and 115 trusts responded (a response rate of 88%). The report also investigates trends in election activity in the foundation trust sector from 2004 onwards.

Overall the research shows that there is significant effort being put into member recruitment and engagement by foundation trusts. Traditional measures of engagement, such as election turnout rates, numbers of candidates standing per governor seat and levels of uncontested elections, suggest that membership trends are normalising after an initial wave of enthusiasm for a new model.

However, there is some concern that it may be becoming more difficult to find candidates to stand for governor elections.

The perception of trusts is that overall engagement with members is improving, in particular with a small proportion of "active" members. There is evidence that approaches to recruitment and engagement are becoming increasingly targeted and sophisticated as the model matures. It is clear from numerous examples that membership can have an impact on provision of current and future services, and in particular help trusts to improve patient experience.

Membership, voting and governor elections

By 31 March 2011 the combined membership of foundation trusts was approximately 1.90 million, up from 1.76 million at 31 March 2010. The estimated total membership number for 2011/12 is 2.03 million.

While the total number of members has risen steadily since 2004, average numbers of members per trust have declined slightly from 16,874 in March 2005 to 13,962 in March 2011. This partly reflects the increased number of new foundation trusts during that time, but also that two foundation trusts authorised as at 31 March 2005 had particularly large numbers of members, thus distorting the average figure at that time.

Governor election turnout rates have reduced from 48% on average across all constituency types in 2004, to 25% in 2010. Figures are nonetheless now in line with turnout rates of membership organisations in other industries. Early turnout rates may also have reflected smaller membership numbers and initial enthusiasm for a new membership model and type of trust.

Average numbers of candidates per governor seat have reduced slightly since 2004 (from 3.63 candidates on average per seat to 2.76), with trusts reporting to find it most difficult to secure candidates for staff seats. Forty-seven per cent of seats are now elected uncontested, a 24 percentage point rise from 2004, although again the rise may partly reflect initial enthusiasm in 2004. Uncontested elections are more frequent in staff governor elections (53% of elections held) than patient governor elections (36%) and public governor elections (35%).

Advertising elections and promoting the role of governors throughout the year, rather than just in the run up to an election, is thought to be essential in improving turnout and numbers of candidates standing.

Recruiting members

Foundation trusts are employing a wide variety of methods to recruit members, and are focusing on finding cost-effective ways to supplement traditional methods in an increasingly competitive market.

Historically, face-to-face recruitment has been the most prevalent and effective means of recruiting new members and this continues to be the case with 93% of trusts rating it very/fairly effective; it allows for personal contact, the ability to answer direct questions and enables messages to be targeted to the individual. In particular, governors are almost always used by trusts for this activity (97%) and most trusts also use staff in this role (86%).

Fifty-five per cent of foundation trusts have employed the services of external agencies in order to help them target and execute membership recruitment and while this can often be a cost-and time-effective solution, trusts need to ensure that agencies understand the foundation trust sector and are able to speak knowledgeably about the trust to recruit engaged members.

This is a key point, particularly in regard to telephone recruitment as responses show that it can sometimes lead to less engaged members who may cancel their membership relatively soon after joining.

Most trusts are also adopting an online approach to recruitment with 97% using their own websites to sign up members. In spite of this high percentage, only 42% reported the web to be an effective way of reaching new members. The fact that it is a lower cost option perhaps explains why so many trusts are persevering with online methods and attempting to find more innovative ways of using the web. Direct mail is still used by 77% of trusts, although only 45% report this to be an effective recruitment tool.

Whatever the method of communication, the message is all important. Successful recruitment has been found to rely on establishing a connection and a relationship between the trust and the potential member, and this connection is rooted in communicating the trust's objectives clearly.

Engaging with members

Member engagement is of paramount importance to trusts, enabling them to fulfil their role as locally accountable organisations, and it is clear that in general trusts are making a significant effort to do this. There is some debate around what engagement means, however. While some trusts view engagement as one-way communication with members (newsletters, updates, etc), others view it far more as two-way communication, undertaking activities to ensure that members have opportunities to become actively involved with the trust. Others go further and regularly involve members in making decisions about the trust's current and future services.

Effort is being made to make communications relevant to members with 43% of trusts reporting to use targeted marketing, and others reporting activities such as tailored open days, tours and workshops which also imply targeting of specific member preferences. Thirty-three per cent of trusts are also offering different levels of engagement such as "gold, silver and bronze", so members can choose how much they wish to be involved.

Events such as open days, tours and workshops around specific issues are proving popular among public members, patients, carers and service users. Asking what members are interested in on sign-up is especially helpful to trusts and allows for more cost-effective engagement going forward. Partnerships with local institutions and groups can also provide cost-effective benefits for both parties.

Eighty-four per cent of trusts report they measure member engagement and around 10% of staff members, 14% of public members and 16% of patient members are reported as being "active" members.

Mental health trusts may face a greater challenge engaging members due to stigma surrounding mental illness. Those highlighted in this research demonstrate just some of the examples from across the sector of innovative thinking to help overcome this and create genuine value-added member engagement opportunities.

The impact members have on their local healthcare services

More than 50% of trusts think their members have influenced: how the trust communicates with the public and patients; business planning; changing an existing service; local public consultations; and developing new services. Eighty-three per cent of trusts say that members have influenced how the trust communicates with the public and patients.

Eighty per cent of trusts surveyed say that governors are very/fairly effective at representing the views of their local community and 69% say that governors are very/fairly effective at representing the views of members who elected them.

Trusts have some strong examples of initiatives that members have helped to develop, often from the concept stage right through to delivery. Many trusts seek the views of members on resource prioritisation, consultation processes and strategic planning to ensure that the public's and service users' needs are being reflected. This level of engagement has a positive impact on all concerned and helps members to feel valued.

These figures are useful to demonstrate both to trusts and to potential and current members the benefits of membership and the influence and impact that members can have. There are also numerous individual examples of where members and governors have made a difference to the patient experience in particular.

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