**TOPIC GUIDE FOR WORKSHOPS**

**Purpose of workshop series:** To work with stakeholders to identify practical ways that secondary data sharing and linkage across sectors can be used to best effect for improving health and reducing inequalities

**WORKSHOP 1**

**Purpose of this workshop:** To co-create a visual representation of how secondary data fits into wider decision-making processes, so that we reach shared understanding of its potential contribution to public health practice and policy

**Intended outputs of this workshop (tangible, countable):**

**•** Visual representation informed by systems thinking which integrates diverse stakeholder perspectives of how secondary data can contribute to decision-making for public health benefit

• Feedback on how it went, to feed forward into planning 2nd and 3rd

**Intended outcomes of this workshop:**

**•** Agreement of shared assumptions/starting points/bounds

• Setting expectations in terms of project - scope; process

• Familiarity with other participants and team - beginning to build working relationship (important)

• Trust in other participants and team

• Shared understanding of current process of data sharing/linkage/use in decision-making, from diverse perspectives

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| **WORKSHOP 1 – TASK 1** | |
| **Instructions for group** | We’re going to pose a broad question, and we want you to tell us the first thing that comes into your head.  The purpose of this task is to help us explore the bigger picture of the complexity of decision-making and all the different factors that play in.  Later on we’ll narrow it down to thinking about the context of public health practice and policy and the specific role of data – but for now we want to think very broadly about decision-making in general terms, and in a variety of settings and contexts.  The aim is to generate lots of ideas – we’ll refine and connect them later – so don’t overthink it at this stage. No such thing as right/wrong or a silly answer; don’t hold back |
| **Question for group** | What would help you make better decisions in your current role?  Say the first thing that comes into your head  An example might be - more staff capacity; or better feedback on outcomes of previous decisions |
| **Pitfalls to avoid** | *There shouldn’t be any constraints at this stage – aim is to enable free thinking and generation of ideas. So no prioritising/connecting of factors required and no editing or commenting on the factors generated; if group starts to do this, redirect them to brainstorming task rather than reflection/commentary.*  *If suggestions are too general, feel free to ask for clarification at this stage* |
| **Potential prompts** | Do the ideas we’ve already got spark any other thoughts?  It might help to reflect on a big decision you’ve made recently – or supported someone else to make.  Can you elaborate on what you mean by [xyz]?  [*REFLECT ON WHAT’S HAPPENING*] e.g. I’m hearing a lot of silence/I’m seeing some confused faces etc – then offer prompts or invite questions/clarification |
| **Timing** | *20 minutes – STOP AT 3.10*   * *You’ll get a 5 min and 1 min warning so please look out for these* * *Please also monitor time yourself to keep discussion on track*   *Suggest 2-3 minutes for introducing task, and remainder for discussion* |

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| **WORKSHOP 1 – TASK 2** | |
| **Instructions for group** | The aim of this exercise is to refine our initial brainstorm of ideas into a clearer and more cohesive picture of what happens in practice when we’re making decisions that affect health, wellbeing, and inequalities - whether in local authorities, HSCPs, NHS, Scottish Government, or the third sector.  Thinking now specifically about the decisions you make in your day to day work, or the decisions you support as an adviser or official – for instance, to elected members or a panel or board. |
| **Question for group** | *Prompt 1*  We’re going to start off by building some connections between factors.  The purpose of this task is to explore the *processes* that affect decision-making – what causes what?  I want to invite you to identify factors which you think are connected – and describe how. For instance, an increase in one might cause an increase in another, or an increase in one might cause a decrease in another. Or they might be reciprocal – the connection goes in both directions.  An example might be – *[choose an example of two factors from map, say why you think they are linked]*  If someone else in the group mentions a connection you’d already thought of – either offer an alternative perspective on why important, or the direction of the connection, or suggest a new connection between different factors.  It might be the case that doing this makes us think differently about something we’ve already written – if so, that’s useful – point this out and we can discuss it. In particular, in thinking about connections, we might identify factors which are missing – that’s good – we can add these.  Any questions on the task?  Who would like to start?  *Prompt 2 – once above concludes*  Now that we’ve built some connections, we want to think about which of these are most important.  The purpose of identifying the most important connections is to understand the most influential points in the process, where we might have the most leverage to make a useful contribution to process of decision-making.  I’m going to go round the group and invite each of you in turn to tell us your thoughts on -   * What is the most important connection (either one of those listed here or a new one you’ve just thought of) * Why it’s important * Then nominate someone else to go next.   if you had the same connection as someone who’s already gone, that’s OK – reflect on *why* you’ve chosen the same one, and what that tells us, and perhaps try to identify a different linkage.  Any questions on the task?  Who would like to start? |
| **Potential prompts** | - What do you mean by XYZ?  - Why would that be useful?  - What’s causes that? And what causes that?  - What’s stopping this happening at the moment?  - Does anyone have a different perspective?  - What do you think makes you see this problem in the way you do?  - Do you see any larger themes emerging?  - Is this a new or persistent problem?  - What structures or underlying processes might be causing this?  - Are there any links here? |
| **Timing** | *25 minutes*   * *You’ll get a 5 min and 1 min warning so please look out for these* * *Please also monitor time yourself to keep discussion on track*   *Suggest <5 mins on introducing task & inviting questions, 20 mins on discussion* |

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| **WORKSHOP 1 – TASK 3** | |
| **Instructions for group** | So before the break we generated lots of ideas about how we make decisions and what factors influence how those decisions get made; and started putting them into context and understanding how connected.  Before we resume, I want to invite you to take another look at the map and see if anything new jumps out at you – something we’ve missed, a connection we’ve not seen before?  [*PAUSE]*  *[RESPOND TO ANY FEEDBACK]*  Having done that, we now want to drill down further and think about how these processes apply to the issue we’re interested in – that’s the use of secondary data, and in particular how such data can be shared and linked across different sectors.  We’re primarily interested in data as a source of knowledge for action – hence why we started by thinking about decision-making in general, and now are zooming in a bit to think about one particular way of supporting decision-making.  The purpose of this task is to move from the general to the specific by exploring the contribution that secondary data – shared and linked across sectors – might make to decision-making and to the challenges you’ve identified.  Again, this exercise might make us reconsider some of the things we did in the other activities, or want to amend what we’ve already done – that’s fine – flag this up and we can discuss. |
| **Question for group** | *Prompt 1*  Looking at the factors and processes we’ve described so far – where might the sharing and linkage of secondary data be useful?   * Which of these issues or connections might it help with? * Where is it being used already? * What needs to be in place for it to be useful? * What is stopping it being useful?   An example might be *- [choose an example of factor which might be relevant and say why]*  *Prompt 2*  The groups we’re in today have been designed to be relatively similar, so everyone in this room has something in common in terms of role, or organisation. How do you think the views we’ve captured today are shaped by our particular perspective, and how might someone from a different role or organisation see it?  Data-sharing decisions as microcosm of bigger factors that influence decision-making |
| **Timing** | *40 minutes – STOP AT 4.40*   * *Suggest 5-10 minutes to capture any further reflections from activities 1 & 2, then remainder for the two prompts above* * *You’ll get a 5 min and 1 min warning so please look out for these* * *Please also monitor time yourself to keep discussion on track* |

**WORKSHOP 2**

**Purpose of this workshop:**

To discuss key stages, challenges, successes of three cross-sectoral case studies so that we can identify transferable lessons from existing situation to inform overall recommendations.

**Intended outputs of this workshop (tangible, countable):**

* Diverse opinions and comments on the case studies of interest and results of scoping review from different stakeholder perspectives
* Common themes of transferable lessons for broader system in relation to:
* Barriers and constraints to data use
* Benefits and value of data use
* Potential solutions
* Further development of the outputs created in workshop 1, integrating both feedback on case studies and on scoping review

**Intended outcomes of this workshop:**

* Consolidate and strengthen relationships created in workshop 1
* Broaden perspectives on process, value, challenges of cross-sectoral linkage
* Shared understanding of motivations and constraints for different organisations with respect to cross-sectoral secondary data use

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| **WORKSHOP 2 – TASK 1** | |
| **Instructions for group** | The aim of this session is to reflect on the integrated map that’s just been presented, and to capture your views on the additional detail added by combining different groups’ ideas and the results of the scoping review. |
| **Suggested prompts** | * Any thoughts or responses to what we’ve just seen in the presentation? * Do the themes on the map represent the way you see the issue? * Is anything missing? * Would you suggest any changes?   Covid has changed things – how does this affect what we see here? |
| **Timing** | *2.10 – 2.35pm*  *Accounting for time spent moving into rooms, should have just under 25 min*  *You should get a 5 min & 1 min warning but please keep an eye on the time yourself as well.* |

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| **WORKSHOP 2 – TASK 2** | |
| **Instructions for group** | Now we’re going to explore the issues raised in the case study in more detail and hopefully relate them to your own experience and work. |
| **Prompts to cover** | * What are your initial impressions and reflections from the case study? * What do you think we can learn from this case study? * Has the case study prompted any ideas about how cross-sectoral data sharing and linkage might contribute to your work? |
| **Timing** | *3.05-3.40pm*  *35 minutes*   * *You’ll get a 5 min and 1 min warning so please look out for these* * *Please also monitor time yourself to keep discussion on track* |

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| **WORKSHOP 2 – TASK 3** | |
| **Instructions for group** | The aim of this session is to think about transferable lessons from the case study, through the lens of the broader themes we talked about in workshop 1.  This will help us set the scene for the third workshop when we’re going to think about how to change the system for the better. |
| **Prompts to cover** | * What does the case study share with the themes identified in the map? * Is there anything that the case study tells us that is missing from the map? * What are the map & case studies telling us about the biggest challenges and bottlenecks? * What do you think are the underlying drivers of these? * What else do we need to know in order to start addressing these? |
| **Timing** | *3.45 – 4.15pm*  *Accounting for time spent moving into rooms, should have just under 30min*  *You should get a 5 min & 1 min warning but please keep an eye on the time yourself as well.* |

**WORKSHOP 3**

**Purpose of this workshop:**

To develop a draft set of recommendations for action so that secondary data sharing and linkage across sectors can be used to best effect for improving health and reducing inequalities

**Intended outputs of this workshop (tangible, countable):**

* Set of draft recommendations for action based on the discussions from workshops, case studies, and scoping review
* Indication of timescales, responsible parties, likely impact and effort (e.g. cost), and degree of consensus associated with these recommendations
* Any other considerations for implementation of these recommendations, or priorities for future research, highlighted by participants

**Intended outcomes of this workshop:**

* Shared understanding/agreement of future ambitions for cross-sectoral secondary data sharing and linkage, and what needs to change to achieve it
* Sense for participants of having ‘closed the circle’ by moving from problem definition to recommendations, via the evidence from workshops discussions, case studies, and scoping review
* Further developing relationships and connections between stakeholders participating in the workshops

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| **WORKSHOP 3 – TASK 1** | |
| **Aim of activity** | The aim of this session is to generate as many ideas as possible for recommendations |
| **Instructions** | * Be creative and ambitious * No editing or commentary on any of the ideas at this stage – that’ll come later * Don’t worry about duplication or grammar or spelling or editing * If someone else’s suggestion sparks an idea – great – add another note (but don’t edit theirs).   Jamboard   * To do this, we’ll use Jamboard – as introduced earlier. * There’s a link in the chat to this and you should be able to edit it directly. * You can either add suggestions yourself using the sticky note tool on the Jamboard, or ask us to add them for you. * We’ll use the headings identified from the previous workshops to prompt ideas and help organise them – add your notes to the heading that seems most relevant. * We’ll share the Jamboard in the meeting window just in case anyone can’t access it themselves, but hopefully everyone can work on it directly via their browser window and see the changes happening live.   In this one, we’re all working independently to add things so there may not be lots of discussion – but do shout if you get stuck with the technology, want us to add something for you, or want to ask a question. |
| **At end of activity** | *This activity goes straight into a 10 min break from 3.05 – 3.15, staying within the breakout rooms*  *Please instruct group to take a 10 min break and return at 3.15* |
| **Timing** | *2.50 – 3.05pm – then into break for 10 mins*  *Accounting for time spent moving into rooms, should have just under 20 min*  *You should get a 5 min & 1 min warning but please keep an eye on the time yourself as well.* |

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| **WORKSHOP 3 – TASK 2** | |
| **Aim of the activity** | The aim of this activity is to distil our ideas from the brainstorm.  We’ll do this by grouping them together on similar themes and refining the wording. |
| **Instructions for group** | Each group will be focusing on two or three headings  Then there’ll be an opportunity afterwards to feed back on the other group’s work on the other headings.  For this activity, you tell us what you think and where to move things and how to change them, and we’ll scribe  Clustering   * Does anyone want to suggest any cards which belong together or overlap? * Do others agree – thumbs up/down/middling? * *Repeat until no further suggestions for clustering*   Refining   * Pick a cluster – does someone want to suggest a form of words that covers this cluster? * Do others agree – thumbs up/down/middling? * Any further refinements? * *May find you want or need to split clusters again at this stage – that’s fine* |
| **Timing** | *You have 30 min overall so suggest ~15 min for clustering and ~15 min for refining*  *You should get a 15 min, 5 min & 1 min warning but please keep an eye on the time yourself as well.*  *Please also monitor time yourself to keep discussion on track* |

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| **WORKSHOP 3 – TASK 3** | |
| **Aim of activity** | The aim of this activity is to consider the implementation of our draft recommendations in relation to responsibilities, timescales, impact, and effort. |
| **Instructions for group** | We’ll do this using Jamboard again  We’ll again be focusing on the same two or three headings – then there’ll be an opportunity to feed back later on the other group’s work on the other headings.  For this activity, you tell us what you think and where to move things, and we’ll scribe.  Our first activity is about who and when   * Working through our recommendations, we’ll discuss who should be responsible, and whether this is a short/medium/long term action * Does anyone want to get us started by suggesting a who or when for one of these recommendations?   + What do others think?   + Any objections? * *Work through them – keep an eye on time – suggest 15 mins*   Our next activity is about impact & effort   * We’ll now work through our recommendations to think about where they sit on the impact/effort matrix * For instance, something might be low effort and high reward – low-hanging fruit – whereas something else might be high effort but also high reward. *(Illustrate on Jamboard using cursor)* * We might identify things that are high effort, low reward – and therefore perhaps lower priority * Does anyone want to get us started by suggesting where one of these recommendations should sit on this matrix?   + What do others think?   + Any objections? * *Work through them – keep an eye on time – suggest 15 mins* |
| **Timing** | *4.10 – 4.40pm*  *Accounting for time spent moving into rooms, should have just under 30min – suggest 15 minutes for who/when and 15 minutes for impact/effort*  *You should get a 15 min, 5 min & 1 min warning but please keep an eye on the time yourself as well.* |