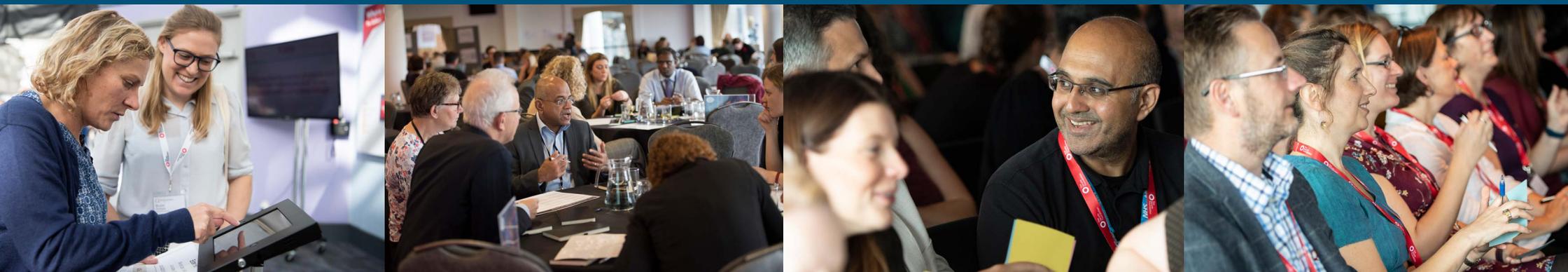




# *Q Exchange Campaigning Toolkit 2019*

Q Exchange is a funding programme that offers Q members the chance to apply for up to £30,000 of funding for their improvement ideas.



# Introduction

## Welcome to the Q Exchange Campaigning Toolkit.

If you're reading this, congratulations! You have been shortlisted as one of the final projects to go forward to the Q community vote.

You now have the opportunity, in the build up to the vote and during the voting phase itself, to promote your project and to gather support from the community.

This toolkit aims to give you everything you need to approach the campaigning stage with confidence and within the ethos of Q. We'll explore how to maintain the 'collaborative spirit', how to connect with the Q community and how to get your message across to voters.

## Final stages

The next and final stages of the Q Exchange 2019 timetable are as follows:



# *The spirit of collaboration*

We will begin with a quick word about the spirit in which the campaigning and voting stages should be approached.

It can be tempting during these final stages of the process, and with the finish line in sight, to become competitive, singularly focused and determined to win no matter what. This is understandable: votes produce binary outcomes. You either win or you don't...and it's human nature to want to win.

But to do so would ignore one of the fundamental principles of Q Exchange and one of the reasons why your project has got this far: collaboration.

Q Exchange exists to offer members the chance to develop project ideas with the help of the Q community. Your shortlisted project has been refined and ultimately strengthened through collaboration. That collaborative spirit does not stop once the shortlist has been revealed. There is still opportunity to collaborate with Q members via the comments section of your project page. Indeed, collaboration continues throughout the voting process and beyond.

It's important to stress that your project's lifecycle doesn't end once voting closes, whatever the result. Remember that the ultimate aim here is not to win but to boost ideas that have the potential to generate value for the health and care system. It could be that the projects that don't win this time around could be successful in a future Q Exchange through continued refinement and collaborative development.

So keep yourself open to new ideas, new connections and ways of collaborating with the community.



# *How to approach Q campaigning*

So what does a collaborative approach look like compared to a competitive one? Here are a few ideas of what to do and what not to do when it comes to campaigning:

## **Do**

- Be open to suggestions on how your project can be refined
- Make new connections within the Q network
- Update your shortlisted proposal if good revisions are suggested
- Collaborate on other shortlisted proposals
- Be open to collaboration from those leading on other shortlisted proposals
- Remember there is a life for your proposal beyond this vote
- Be positive
- Focus on the wider aims of Q Exchange

## **Don't**

- Disparage another shortlisted proposal
- Dismiss the ideas of other shortlisted proposals
- Dismiss revisions just because you're a finalist
- Favourably misrepresent your proposal when promoting it to members
- Focus on the winning
- Forget what got you to this point
- Offer incentives to voters
- Be negative

# Some myths about campaigning

We'll shortly look at the practicalities of campaigning before providing some tips on how to get your message across effectively. But before we do that, let's debunk some myths about campaigning:

## It's something you have to worry about

There is nothing to worry about. You've got this far, so you and your proposal must be doing something right. Keep focusing on that collaboration theme and the wider aim of Q Exchange... and take the pressure off yourself! The programme is designed to help improve health and care, so don't worry about 'succeeding' and, instead, focus on the fact you are contributing towards better outcomes.

## It's going to take time, a whole lot of precious time

When you think of 'campaigning', you may be thinking of a calendar packed full of events, networking and publicity activities. In reality, campaigning as a Q Exchange finalist is much more straightforward. While it's a good idea to plan how you are going to approach this, campaigning will be relatively quick and easy. The next slides will set out what you need to consider.

## It involves a public 'pitch' or 'hustings' event

Previously, campaigning for Q Exchange included a public pitch but there is no such event this year. The campaign and vote are being held exclusively online.



# Connecting with the Q community

Voting for this year's Q Exchange will be conducted entirely online, enabling the whole community to vote. The first step to a successful campaign is making sure you can connect with the voters. To do this, you need to identify the channels of communication available to you. Once identified you should think about how you are going to use those channels to communicate with Q members. Here are some ideas:

## Your proposal project page

This will be at the heart of your campaign as it will contain all the information voters require to make their decision: team members, full project details, comments area for collaboration etc. This is your pitch to the Q community so the aim should be to **promote this page as much as possible** and to make sure your project page content is as effective as possible (more on that in the next section).

## Twitter (and other social media)

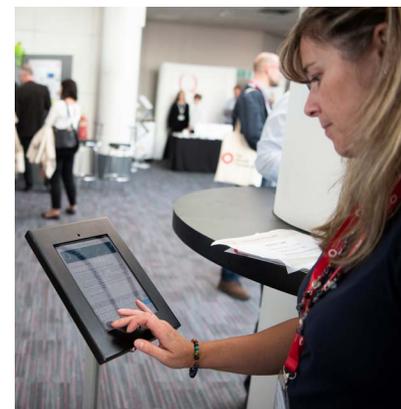
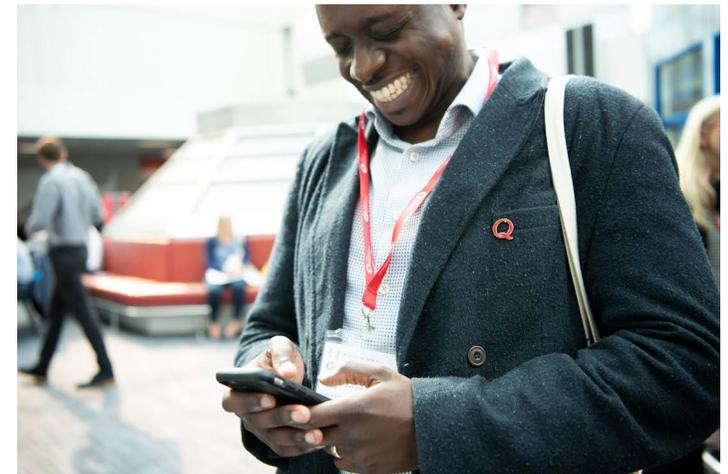
Social media is a great way to highlight your key selling points, to grab attention and create a buzz about your project, and to signpost Q members to your proposal project page. Remember to use the hashtag #QExchange on all your social media posts so it's easy for members to find and interact with you.

## Group spaces on the Q website

The Q website hosts a number of online groups, including one for each Q Exchange theme. These spaces can be used to promote your project. Just ensure you do this in an appropriate way and that your project is of relevance to that group.

## Existing networks outside of Q

You may well be part of networks outside of Q that contain Q members. If so, use these to alert members to your proposals and signpost them to your project page.



# Getting your message across

If the first step to campaigning is making sure you have open communication channels, the second step is getting your message across in a clear and engaging way. The grid below outlines some useful things to think about when doing so. Click on a square for more details or scroll through the next pages.



# *Making the most of your project page*

Your proposal project page is at the heart of your campaign and your aim should be to get as many voters to visit your project page as possible. Once they are there, you'll also want to ensure your content is as clear and as effective as possible. Here are some things to consider:

## **You can edit your existing content**

Now that the shortlist has been revealed, you can revisit your project page and edit it. You can do this anytime before the vote opens. Even if you decide not to change a thing, reviewing your page will be of benefit at this stage given the various things we list in this toolkit.

Ask yourself:

- Is the proposal presented in the best possible way?
- Is the message clear and easy to understand?
- In the current form, does the project page give your proposal its best chance of receiving votes?
- Does the project have a catchy and memorable title that will stand out from other proposals?

## **Use all tools available to you**

Did you know that your project page can contain one image, chart or photograph to help others visualise your project? Did you know that you can embed a video to your project page by sharing an open access URL from YouTube or Vimeo? You can use these visual forms of content to help break up your page and make it easier for voters to engage with your proposal.

## **The comments section**

Members can interact with your proposal by leaving comments at the bottom of the project page. Make sure you reply to these and open a conversation where appropriate (rather than closing comments off with a curt 'thank you', for example). Your project page should be as active as possible during the campaigning and voting stages. As such, ensure you are checking-in regularly, replying to comments and updating/revising your page as you see fit.

## **Your written content matters**

Clarity of argument is something to strive for in your written content. If members can clearly understand your rationale, your plan and your vision, they are more likely to give you their vote. For help with this, visit the ['avoiding distractions'](#), ['unique selling points'](#) and ['structuring a message'](#) parts of this toolkit.

# Principles of participation

Getting people to participate is a tricky task. Nowadays there are a myriad of different organisations, memberships and commercial entities vying for the individual's attention, engagement and involvement. Encouraging Q members to a) read your proposal and b) vote for it is part of this wider challenge. To help, here are some things to consider:

## **Make it easy for them to participate: remove the obstacles**

The easier it is for people to participate, the more likely they are to do so. So think about those obstacles/barriers that could get in their way. Instead of directing people to the Q Exchange website, why not direct them to your proposal project page? Instead of using long, verbose sentences, make your written content short and snappy.

## **Make it interesting to Q members: what's in it for them?**

People participate when they can see a benefit from their participation. Think about your proposal from their point of view. What's of importance to Q members and how does your proposal help them? Make that connection for them: the connection between your proposal and their benefit.

## **Show them something tangible and relatable: aims, examples, 'the journey'**

Building on that idea of being 'relatable', are there other ways that you can show this? Can you show that you understand a problem they may face? Have you experienced that problem yourself? Can you show them how your project may be applicable to other organisations/settings?

Describe your journey in developing your proposal. This (or part of it) may be something that they can relate to.

## **Target your communications and invitations**

Members will participate for different reasons. Can you identify what these are? Are they driven by cost savings? Are they driven by quality improvement? Are they driven by technological advances? If you can identify these, think about tailoring your messages. In driving people to your proposal project page (for example from social media or from Q online groups), can you highlight the selling points most relevant to those people?

## **Use existing networks and contacts**

People are more likely to participate if they are part of your existing networks or if you share a mutual contact with them. Think about what connections exist between you and other Q members, even if they are a step removed. Emphasise these connections and use them to promote your proposal and explain your project.

## **Remember that some people will want to be involved and some people won't**

Finally, there will always be those who won't want to participate. There are many reasons for this: lack of time, lack of interest, or perhaps they're just having a bad day. Don't stress yourself by aiming to engage with each and every one of the 3,000 strong membership. Do what you can but focus on those who are responsive to your invitations.

# Avoiding distractions

When you are reading websites, newspapers or books, what puts you off? It's worth thinking about this when it comes to the written copy words on your project page. 'Distractions' can cause your potential voter to lose interest. Here's some things to avoid:

## **Bad spelling and/or grammar**

This always sticks out like a sore thumb and can easily distract your reader. It's also a very simple thing to fix: so double and triple-check your proposal's text to avoid these errors.

## **Long, rambling sentences**

A good, readable English sentence is roughly 12-16 words long. Professional corporate writers will aim to write sentences well below 25 words. Avoid going beyond this upper limit as it's likely to confuse, bore or alienate voters. It's also highly likely that the sentence could be broken down into two separate sentences. Avoid liberal use of the word 'and' and 'but'. Keep your sentences short, punchy and concise.

## **Acronyms, abbreviations and jargon**

The health sector is filled with acronyms. It's easy to see why you would use them in your written content, especially when word limits are in play. When using acronyms, spell out the full name with the short-hand in brackets in the first instance so voters understand what the acronym stands for. You should never assume that the reader knows what you're talking about – even in a like-minded community such as Q. If you can, avoid shortcuts that can confuse readers.

## **American English**

This is one of the more common distractions thanks to our use of American word processors. It's easily avoided by double and triple-checking your written content. Look out for those words where certain programmes change 's' to 'z': 'authorize', 'customize', 'legitimize' etc.

## **Inconsistent voice**

If you are part of a proposal team and you have divided up the workload of writing content, make sure you adopt a consistent, single voice. People write in different ways and it can be distracting if you simply cut and paste content together without checking how it flows. Look out for change in the writing point of view, i.e. from first to second or third person. Also look out for a change in style: from short sentences to long. If you review the content and notice a definite change, edit it to bring it together as a coherent whole.

## **Complicated messages**

Remember, the aim is to get your message across in a clear and engaging way. Don't complicate things, keep your message short and simple. Use enough detail to provide the context and reasoning the voter will need, but don't add content just to show you 'know your stuff'. Ask yourself, 'does this add value for the reader'? If it doesn't, delete or rephrase it.

# Unique selling points

You may have heard of unique selling points (or USPs) before. These are sometimes referred to as 'win themes' or 'key points'. It may seem counterproductive to the collaborative spirit to consider your 'win themes', but it's a useful exercise in creating a compelling proposal. For the campaign and vote it's useful to identify your USPs and make these prominent on your project page and in your messaging. Ask yourself these questions:

- What sets your proposal apart?
- What makes your proposal different to other solutions put forward?
- How many USPs do you have? You may have several.
- Which USPs matter the most to the members you're speaking with? Is it cost-savings? Is it a unique bit of technology? Is it a person-centred solution?
- What's important to the Q community?

Once you've answered these questions, think about how you can lead with your USPs in your messaging. Can you make them stand out on your project page? Can you use them in your Twitter and social media advertising, drawing members to your project page?

However, always remember the spirit in which Q Exchange operates. Do not use USPs that compare your proposal to other submissions. I.e. the 'Unlike my competitor...' argument. This is called 'ghosting' and should be avoided.



# Structuring a message

The structure of your message is defined by the layout of your proposal project page. However, within the space available to you, there is still room to structure a clear and effective message. How you do this is up to you, but there are certain elements that you'll need to contain. Here's an example of how you could do it:

## **Grab their attention with your key point**

This could be your USP (or USPs) identified earlier. Whatever the key to your message is, lead with it so it's prominent from the start.

## **Make it relevant and interesting to them**

Having set out your key message, make it relatable and relevant to the reader. What is it that links their environment to your proposed solution? What shared problem(s) does the proposal solve? Think from the reader's perspective and place your message in their context so they can see the potential benefit.

## **Be honest about what you don't know**

Audiences will appreciate your honesty, and this will help drive engagement to your page, encouraging others to comment and strengthen your proposal.

## **Provide an example or illustration**

Audiences are able to better understand messages when they're shown a practical example. Can you show them something that puts your proposal into practice? It could be something like, "we trialled this approach and the results

were...". It could be a graph or demonstration video. Show members some early outcomes that can convince them that your proposal has potential.

## **Use details to reassure, but find the balance**

There will come a point where members will think, 'this sounds too good to be true'. Scepticism is a natural and healthy part of deciding where to cast a vote. Reassure the reader with details but don't tip the balance into being too thorough - it will alienate the voter. When adding detail, always ask yourself 'does this add value to the reader'? Ultimately, will it help them to understand the value of your proposal?

## **End on an action**

Summarise what you hope to achieve following a successful vote. Make it clear to the voters what the next steps would be following funding so they can 'buy-in' to your proposal and vote.

# Design and presentation

Never underestimate the power of design and presentation. Your written content will always be at the heart of your argument, as it's the format you have put most thought and effort into. But design and visual presentation can be effective tools in lifting your message by accentuating your key points and providing another way to process information.

Different people process information in different ways. Some will prefer words; some will prefer visuals in the form of pictures, illustrations and graphs; some will prefer to listen to your argument (perhaps via a video). As such, thinking about the way things look, as well as how they sound, will be of benefit to your message.



We've already talked about making the most of your project page in terms of an image and video, but for your written content, have you used headings and bold type to make your key points stand out? Have you used paragraphs effectively, to break up your message and draw the reader's eye away from block, bulky text?

When using Twitter and other forms of social media, do you have a set of supporting images, photos or graphics that you could use alongside your key message? If so, this could help attract members and direct them to your proposal project page. And remember the hashtag, #QExchange, to make sure your message is presented as a part of the programme.



# *Communication: horses for courses*

Finally, you may want to think about how you use your different communication channels to get your message across. Different channels are useful for different reasons, so it's best to take a 'horses for courses' approach. Here's a summary of your main channels and how best to use them:

## **Your proposal project page**

This is the place to present your message in full. So, remembering what we've set out in this toolkit, make sure your project page is as good as it possibly can be. Also, remember to regularly check-in, engage with the wider community via the comments section and revise as necessary.

## **Twitter (and other social media)**

Twitter (and social media in general) is good for short, sharp, engaging messages. Think about using your USPs here to highlight your proposal. Draw members to your project page using your key points and, if you have them, use images. Remember the hashtag #QExchange too. How often should you tweet? There's no magic answer here but we'd suggest a few times a day spread out over regular intervals.

## **Group spaces on the Q website**

Here, members will be expecting a little more detail than a Twitter crowd, but not an entire repeat of your proposal project page. Think of this as your 'elevator pitch', i.e. a brief, persuasive bit of written copy that can spark interest in your proposal. Of course, once conversation has started, don't forget to engage in that. Don't post your message and run.

## **Existing networks outside of Q**

Use your best judgment and take a pragmatic approach. If members are low on time and attention, keep it short, snappy and relevant to your key message. If you have the space to open up a discussion, introduce them to your concept and encourage them to have a conversation with you about it.

# Summary

Consider this checklist as you enter the campaign and vote:

- ✓ Is your proposal project page the best it can be?
- ✓ Have you identified the channels of communication open to you?
- ✓ Have you outlined a top-line plan (or strategy) for the campaign and vote, and how you are going to drive voters to your project page?
- ✓ Have you set aside time during this next phase to engage and collaborate with voters?

The final campaigning and voting stages of Q Exchange should not be stressful. Enjoy the next few weeks – continue the conversation, continue to work with your fellow members and continue to strive for better health and social care outcomes. Whatever the result of this particular vote, you should be congratulated for your efforts so far and encouraged that your hard work will have a life beyond this voting cycle.

*Best of luck.*

# *About the author*

This toolkit has been written by MES – a company independent of Q and the Q Exchange programme.

MES help build and support engaged communities by blending technology with communications expertise.

They are specialists in the health sector and provide a variety of patient experience, membership and community solutions to

help health organisations engage with their members, patients, stakeholders and staff. As experts in the field, they also inform and guide strategy and lead discussion.

They are part of the ERS Group, a Civica Group Company. Electoral Reform Services, another member of the group, is running the Q community online vote.



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