

Worksheets

Patient & Public Engagement

One Day Workshop

British Columbia Ministry of Health

**PATIENTS AS PARTNERS
INITIATIVE**

1.2 - PROJECT OVERVIEW

PROJECT OVERVIEW	
Name of the Project	
Location	
Decision Maker	
Decision Statement	
Brief	
Project Decision Process	

2.1 - ENGAGEMENT NEEDS ANALYSIS

Engagement Needs Analysis ¹			
Risk Element	Not Very Likely	Somewhat Likely	Likely
There is legislation and/or regulations that compel the decision maker to undertake engagement with those impacted prior to decision making. For example , building a hospital on lands that may require consultation with Indigenous People (First Nations Land Management Act) or consulting with local governments before an order is issued from the ministerial office (B.C Health Act).			
There are provincial or health authority policies that require the conduct of engagement during this particular type of project/decision; for example , accreditation standards or policies that encourage person- and family-centred care.			
There is a compelling legal precedent that mandates engagement. For example , a court case prevented a similar decision because adequate engagement was not undertaken.			
There is an established public commitment on the part of the decision maker to undertake engagement for decisions like this, prior to issuing a decision. For example , commitments made by elected officials.			
There are likely to be significant adverse impacts on certain stakeholders.			
When announced, the decision will cause public controversy or debate.			
Implementation of the decision will create (or appear to create) winners and losers within the <i>stakeholder community</i> .			
It will be beneficial for the decision maker to raise awareness and/or educate those groups that will be impacted by the decision about the rationale for the decision prior to an announcement.			
Stakeholders hold information that would benefit the decision maker and that information is only, or best, accessible through engagement.			
Engagement will enlist stakeholders who will benefit by the decision and thus provide public support to the decision maker.			

¹ Table is based on International Association of Public Participation needs analysis protocol

2.2 - STAKEHOLDER MAPPING

Stakeholder Mapping – Interview Guide		
Name: (please note most pre-engagement interviews do not identify the interviewee when reporting out on the pre-engagement interviews)	Phone:	Email:
Decision Statement:		
What is important to you as we go forward in making this decision?		
What aspirations or hopes do you have as they relate to this project?		
What concerns or unknowns do you have related to this project?		
Tell me about how you think stakeholders should be engaged? Probe if needed: What engagements have you seen in the past that you believe have been successful?		
What communications approaches do you think could be most successful in reaching stakeholders interested in this project?		
Who else should we be speaking with at this point in the decision-making process? Do you have any last thoughts or suggestions for us at this time?		

3.1 - ENGAGEMENT SPECTRUM

Stakeholder Mapping Matrix ¹⁴				
High Level of Influence →	Involve <ul style="list-style-type: none"> Ideas, concerns, preferences and values are heard and considered in developing options and approaches. Feedback is provided on how participant input affected the decision. 	Collaborate <ul style="list-style-type: none"> Work together on all aspects of the decision for developing alternatives and a preferred solution. Input is included into the decision to the greatest extent possible. 	Empower <ul style="list-style-type: none"> Decision-making is placed in the hands of the stakeholders. The decision maker implements what the stakeholders decided. 	
	Consult <ul style="list-style-type: none"> Ideas and concerns about a proposal or alternatives are heard and considered. Feedback is provided on how their input affected the decision. 	Involve or Consult <ul style="list-style-type: none"> Ideas and concerns are heard, acknowledged and reflected in the recommendations. Feedback is provided on how their input affected the decision. 	Collaborate <ul style="list-style-type: none"> Work together on all aspects of the decision for developing alternatives and a preferred solution. Input is included into the decision to the greatest extent possible. 	
	Inform <ul style="list-style-type: none"> Clear information is provided to increase understanding about the decision. The decision is made by the decision-maker. 	Consult <ul style="list-style-type: none"> Ideas and concerns about a proposal or alternatives are heard and considered. Feedback is provided on how their input affected the decision. 	Involve <ul style="list-style-type: none"> Ideas, concerns, preferences and values are heard and considered in developing options and approaches. Feedback is provided on how participant input affected the decision. 	
Low		Level of Impact →		High

¹⁴ Adapted from the Victoria State Government (Department of Education and Early Childhood Development) Stakeholder Engagement Framework <https://www.eduweb.vic.gov.au/edulibrary/public/commrel/policy/oct2011stakeholderengagement.pdf> and the International Association of Public Participation Spectrum <http://iap2canada.ca/page-1020549>

4.1 - DECISION PROCESS MAPPING AND ENGAGEMENT OBJECTIVES

Decision Step	Decision Points	Engagement Objectives

4.2 - ENGAGEMENT DESIGN

Engagement Objective:				
Short Listed Techniques	Technique			
	#1	#2	#3	#4
How likely is the technique to achieve the objectives?				
What will it cost and do we have adequate resources to pay for this technique?				
Will this technique be accessible to all stakeholder groups?				
Do we have access to the tools (e.g. technologies) and personnel needed to implement this technique?				
Do we have the expertise to implement this technique successfully or do we need outside support?				
Is there sufficient time to successfully implement the technique?				
Does the technique have a proven track record of success in similar situations or with similar audiences?				
Does this technique enable participation by hard-to-reach groups? What would be needed to reduce barriers to participation?				
Does this technique enable participation by groups with stigmatizing conditions? What would be needed to reduce barriers to participation?				
Will it meet all legal/policy requirements? Are additional steps (e.g. media release, privacy impact assessments, confidentiality agreement, etc.) needed to collect the type of data from the technique?				
Are there any special circumstances that might affect the use of this technique?				
Can you obtain internal support for this technique? In some cases you may need support for a specific technique from elected officials.				

4.3 - COMMUNICATIONS PLANNING

Project Narrative:	
Communication Objectives:	
Communication Challenges:	
Key Messages:	
Partners and Channels:	
Communication Budget:	
Communications Measurement:	

Engagement Announcement:

The value proposition:
Essence of the decision:
Purpose of engagement:

5.1 - PROJECT MANAGEMENT

Engagement Objective:

Consider	Who	What	When
1. Who has overall responsibility for this objective?			
2. Who is providing a support role?			
3. Who are the patients and/or families or other stakeholders that are involved?			
4. Who is managing the budget and logistics?			
5. Who has organizational responsibility for communication, such as graphics support?			
6. Who are the internal resources with special expertise that are important to the process, such as engagement or content experts?			
7. Who outside the decision process might be important to include to increase the credibility of the engagement?			
8. What outside resources with special expertise will be important to include in the process, such as independent technical experts.			

5.2 - MEASUREMENT AND EVALUATION

GENERIC EVALUATION MENU

PROCESS ASPECTS	
Clear Task Definition and Accountability:	
INDICATORS	SOURCES OF EVIDENCE
Coordination:	
INDICATORS	SOURCES OF EVIDENCE

PROCESS ASPECTS

Equal Opportunity to Participate:

INDICATORS	SOURCES OF EVIDENCE

Stakeholder Experience:

INDICATORS	SOURCES OF EVIDENCE

Representativeness:

INDICATORS	SOURCES OF EVIDENCE

Transparency:

INDICATORS	SOURCES OF EVIDENCE

RESULTS ASPECTS

Capacity Building:

INDICATORS	SOURCES OF EVIDENCE

Culture of Consultation:

INDICATORS	SOURCES OF EVIDENCE

Influence on Decision Making:

INDICATORS	SOURCES OF EVIDENCE

Learning:

INDICATORS	SOURCES OF EVIDENCE

