

AREAS TO ADDRESS	PHASE 1: READINESS & LEADERSHIP SUPPORT	PHASE 2: PLANNING THE ENGAGEMENT & PREPARING THE TEAM	PHASE 3: RECRUITMENT, ON-BOARDING & ORIENTATION	PHASE 4: ENGAGEMENT ACTIVITIES	PHASE 5: EVALUATION OF ENGAGEMENT	PHASE 6: REPORT BACK & RESPECTFUL ENDINGS
Site/Leadership Readiness	<ul style="list-style-type: none"> What is the awareness across the team to “why we are taking this on”? Are leaders supportive of this engagement Do you truly believe in the value of the lived experience Is empathy authentic Does leadership ensure support, time, resources 	<ul style="list-style-type: none"> Who is already engaging individuals with lived experience in our area/community Should we consult with: AHS Provincial Patient and Family Advisory Group, AHS SCN Patient Engagement Reference Group, community agencies/partners, other AMH advisory councils, etc. 	<ul style="list-style-type: none"> You have identified how you will seek out, engage and on-board those with lived experiences Required infrastructure is in place (reimbursement, transportation, parking, childcare, etc.) Documentation has been kept to a minimum but is now prepared (role expectations, consents, releases, confidentiality etc.) Develop and provide appropriate level of orientation to the initiative 	<ul style="list-style-type: none"> Development of ORI engagement methods has occurred based on uniqueness of the site and expectations and goals The engagement has begun, tools and resources are in place to guide the team and support the lived experience participants to build relationships through the process Leadership is aware and visibly supporting the engagement 	<ul style="list-style-type: none"> Will this engagement be evaluated not just for its outcomes but also areas to grow in future engagements Does leadership commit to ongoing culture change as determined by the team and the lived experience engaged Honest and safety around how the team perceived the engagement The team can identify successes and goals or areas for improvement before the next engagement 	<ul style="list-style-type: none"> Ensure responsibility for respectful ending to the engagement relationship is clear Impacts and outcomes of engagement are shared broadly and supported in future initiatives
Lived Experience Engagement	<ul style="list-style-type: none"> What support do we need, or have we offered supports before we engage (community, friend) Are there unique needs you have to enable participation Who are your resources and supports What are your goals for engaging How can this opportunity enhance your life and your community Do you feel safe in this environment and trust the team to be respectful Are you able to share openly regardless of what your story holds 	<ul style="list-style-type: none"> You feel comfortable with the spaces and readiness of the group you are meeting with You feel heard and your needs before engaging have been met What type of engagement are you comfortable with Who would you like to have come with you Do you feel comfortable with the team you are consulting with, if not what do you need? Are you prepared for what this engagement may include (emotion, vulnerability etc.) 	<ul style="list-style-type: none"> You have been approached in a respectful manner clearly outlining what the group is looking for You have had opportunity to review and seek support before signing any documentation You are clear on your role and reason for engaging You feel prepared to engage I know who to call with questions I know expenses and barriers to engage will be removed 	<ul style="list-style-type: none"> You are invited into the engagement in a meaningful way You feel respected, cared for, involved You are clear on your role 	<ul style="list-style-type: none"> You know your feedback on the engagement process is welcomed and will be listened to You know how your input was used or why it was not 	<ul style="list-style-type: none"> How will you ensure you are well and ready to end the engagement Do you feel safe to end the engagement at any time What are your goals after this opportunity (future engagement, community referral etc.) You are aware that your role was critical and created change You know the outcomes and next steps You felt respected and cared for You know how your input and experience impacted changes You are clear when the engagement has concluded
Changing Practice Culture	<ul style="list-style-type: none"> Do we need consultation with specialists on changing culture Has the team developed trust among themselves to take on this journey Clear communication channels and responsibilities established Is empathy authentic The difference between engaging lived experience because it is the right thing to do and that is where the wisdom lives vs. tokenism Are supports in place for team debrief, processing and caring 	<ul style="list-style-type: none"> Have your team members developed relationship, rapport and trust (this is a time component) Training is complete and the team has addressed barriers, concerns, biases, fears and feels supported and ready to engage Are you familiar with protocols for each unique type of engagement 	<ul style="list-style-type: none"> Leadership supports the direction of engagement Orientation for all is complete and a sense of understanding the importance of engagement now exists 	<ul style="list-style-type: none"> Awareness of the importance of ongoing support for all involved has been addressed Capacity is built within the team to support future engagement activities If the reasons why either party is engaging change, a pause and re-evaluation will occur 	<ul style="list-style-type: none"> The team has a debrief process in place All parties identify what worked and what needs to change or grow Engagement was purposeful and positive 	<ul style="list-style-type: none"> A culture of mutual trust and respect has been developed Teaching what ending needs to look like may need to occur for all parties Next steps will be set if engagement activities will continue or take new directions
Special Considerations	<ul style="list-style-type: none"> What type of engagement is best (video, teleconference, audio, 1:1, written etc.) Has a conversation occurred about space (will a child be present, will there be active use, is lived experience person still grieving a loss?) Who will be designated as the 'liaison' or contact and support person throughout the process If the reasons why either party is engaging change, a pause and re-evaluation will occur Awareness and respect of hopes and expectations for all parties is critical to success 	<ul style="list-style-type: none"> Have you consulted where the individual with lived experience is most comfortable? YOU CAN COME TO THEM...meet in a space of their choosing, keeping safety for all in mind (will lived experience person be under the influence, etc.) Are there adaptations needs to your space to be welcoming and safe for everyone Are there resources available for all parties if required (team may need further support in learning to work with those in active addiction, lived experience individual may wish to move from addiction to treatment) 	<ul style="list-style-type: none"> Recruitment is about building relationship, this is a time commitment by all Orientation is ideally held face to face to build relationship and trust; conducted by leaders/facilitators leading the initiative This is where the risk of tokenism vs authentic engagement can become blurred 	<ul style="list-style-type: none"> During engagement is the most vulnerable time for those with lived experience; this has been planned for and mitigated Processes are in place to support applying the learning's from the engagement processes 	<ul style="list-style-type: none"> Do all parties understand the risks, expectations and goals of the other and how to open conversation up if these change 	<ul style="list-style-type: none"> A disengagement plan is in place that is positive There is no failure, but rather this is a journey How to reconnect if an abrupt ending occurs Referrals for on-going support made if requested At no time should an engaged lived experience individual feel “dropped” or suddenly alone. Clear support is critical.
Tools & Resources to support	<ul style="list-style-type: none"> The Voice of Patients and Families: A Getting Started Guide www.albertahealthservices.ca/assets/info/pf/pe/if-pf-pe-voice-patient-families-guide.pdf Engagement Readiness Checklist http://insite.albertahealthservices.ca/assets/pe/tms-pe-readiness-checklist-for-partnering-with-patient-and-family-advisors.pdf Empathy Mapping https://www.albertahealthservices.ca/assets/info/hp/cdm/if-hp-cdm-empathy-mapping-summary.pdf Seek support in your zone through AHS Engagement & Patient Experience zone-based consultants as well as local Patient/Family Advisors 	<ul style="list-style-type: none"> AHS online learning modules: Patient Engagement 101 (Available Spring 2018) Meaningful Engagement Module1: Roles & Responsibilities of Patient Advisors; Module 2: Roles and Responsibilities of Staff; Module 3: Creating Meaningful Engagement AHS EPE Patient Engagement Guidebook- https://www.albertahealthservices.ca/assets/info/pf/pe/if-pf-pe-guidebook-for-engaging-patient-family-advisors.pdf 	<ul style="list-style-type: none"> AHS Patient and Family Engagement toolkit http://insite.albertahealthservices.ca/assets/pe/tms-pe-patient-engagement-resource-kit.pdf AHS Patient and Family Advisor Resources- https://www.albertahealthservices.ca/info/Page15876.aspx How to Involve People Who Use Drugs http://towardtheheart.com/assets/uploads/15161442266vojisi05U2QPzPU4p56pnp6FOSjcoMnObC2L.pdf 	<ul style="list-style-type: none"> Ways to include the voice of patients and families http://insite.albertahealthservices.ca/17294.asp Existing AHS Engagement & Patient Experience toolkits can be leveraged and customized as needed for PHC Contact: patient.engagement@ahs.ca Seek support in your zone through AHS Engagement & Patient Experience zone-based consultants as well as local Patient/Family Advisors 	<ul style="list-style-type: none"> (coming soon Spring 2018) Evaluation Tool for Patient Engagement in SCNs Contact: patient.engagement@ahs.ca https://www.cfhi-fcass.ca/sf-docs/default-source/patient-engagement/awesome_workbook-fraser-health.pdf http://insite.albertahealthservices.ca/assets/pe/tms-pe-the-value-of-engaging-patients-and-families.pdf 	<ul style="list-style-type: none"> AHS EPE Patient Engagement Guidebook https://www.albertahealthservices.ca/assets/info/pf/pe/if-pf-pe-guidebook-for-engaging-patient-family-advisors.pdf