

ENGAGEMENT PLANNING SUMMARY

This Engagement Planning Summary is a summary distilled from the Patient, Family, Caregiver and Public Engagement Planning Guide (2018)¹. The Engagement Planning Guide is a tool that supports the planning, design, management, reporting and evaluation of engagement activities and communications. The Guide uses international best practices in engagement and aligns with the Ministry of Health's Patients as Partners Initiative policy recommendations.

As you work through these steps in the planning process consider the following:

- 1) Each step is linked to a meeting or conference call with the engagement planning team;
- 2) Each step in the process must be completed in sequence (this is a linear process); and,
- 3) Once each step is completed check-in with the decision maker or their delegate with a deliverable for sign-off (ex. A stakeholder map, objectives, communications plan, etc).

1 ENSURE COMMITMENT FROM KEY SPONSOR(S)/ DECISION MAKERS

1a. Establish the engagement planning team

Identify up to five individuals who represent different perspectives and create the engagement planning team. Each member must bring a unique perspective to be considered throughout the process.

1b. Develop a project overview

The engagement planning team will develop a decision statement that communicates: 1) what decision is being made, 2) by whom, 3) when, and 4) for what result.

2 SEEK TO UNDERSTAND EXTERNAL PERCEPTIONS OF THE DECISION

2a. Develop an engagement needs analysis

The best way to understand people's interest and perceived risk associated with not engaging stakeholders in the decision is to ask them. Include groups that are positively and negatively impacted by the decision. Up to ten pre-engagement interviews are recommended. Refer to the Ministry's Tip Sheet on Pre-Engagement Interviews for assistance.

2b. Conduct an impact analysis & stakeholder mapping

Based on your consideration of positive and negative impacts, use an engagement needs analysis to identify the likely direct, indirect and unintended impacts of the pending decision. Once the impacts are known, work to identify stakeholder communities and/or individuals who are likely to be impacted both positively and negatively.

1. The complete **Patient, Family, Caregiver and Public Engagement Framework and Toolkit** which includes the Planning Guide, Tip Sheets and other resources can be found at <https://www2.gov.bc.ca/gov/content/health/about-bc-s-health-care-system/partners/patients>

3 SELECT LEVEL OF ENGAGEMENT

Identify where you are on the IAP2 spectrum

Based on what you learned in step 2, consider: what is the desired level of influence stakeholders are seeking? What is the expectation of the decision maker? Refer to the Ministry's Spectrum Assessment Tip Sheet to identify where the engagement will be on the spectrum of engagement.

4 IDENTIFY DECISION-MAKING PROCESSES & COMMITMENTS TO STAKEHOLDERS

4a. Confirm the decision-making process

As a team, write out all steps and processes in the decision-making process by which the decision will be achieved. Identify at each step what role stakeholders might have and what would be the outcome and/or output. Each of these becomes engagement objectives. Different objectives can be at different levels of engagement on the spectrum throughout the course of a project/engagement.

4b. Develop an engagement design

Identify which is the most appropriate technique or combination of techniques to achieve the engagement objectives. The technique(s) chosen should fit with the spectrum level of the engagement. Refer to the Ministry's Tip Sheet on Engagement Techniques for assistance.

4c. Develop a supporting communications plan

A communication plan is developed to provide clear and consistent communication of the engagement opportunity and provide supporting information for the decision maker, patients and other stakeholders.

5 DEVELOP AN IMPLEMENTATION PLAN

5a. Develop a timeline

Based on your engagement and communications objectives, identify when key tasks are to be completed. Create a timeline and deadline for each task to be completed. Assign a member of the engagement planning team to lead each task.

5b. Develop measures for each engagement objective

How will we know we have been successful? Engagement is more than a numbers game, so think beyond quantifying the success of engagement by the number of participants to receiving information that will support the decision. Refer to the Ministry's Tip Sheet on Measurement and Reporting for assistance.

5c. Plan for reporting back and a feedback loop

Plan for how you will report on the engagement findings and how the findings report will be shared with those who participated in the engagement to show how their voices have affected the decision.