



Appendix 10

Essential Steps for conducting meaningful patient engagement activity/ies in healthcare service design, delivery and evaluation /healthcare policy making

All steps should be underpinned by the HSE values and guiding principles outlined earlier in the Roadmap.

Please read section I prior to planning your engagement activity.

Step 1: Establishing the aims

It is important to clearly state the aims of the work you are asking people to become involved in and the purpose of the engagement. The overarching aim of patient engagement should always be to increase informed decision-making and patient choice, to improve the quality and safety of healthcare, to improve patient experience and to utilise patient expertise. Engagement activities should be mutually beneficial.

What are the aims of your work?

What are the aims of engaging with patients in this work?
How will engagement contribute to meeting the aims of your work?
What decisions can be influenced and informed by engagement?

Will the engagement activity be mutually beneficial?
Will it result in improved services, improved health outcomes, improved safety and improved patient experience of services?

Step 2 : Who needs to be involved and why?

"Patients are the ultimate stakeholders – the ones who live or die, suffer or improve, based on how it all works out".
Dave de Bronkart Let Patients Help

Stakeholders (see links for stakeholder mapping templates page 61)

• Who will be affected by this work?

• Who will benefit from it?

• Who may be impacted negatively or positively?

• Who can bring additional expertise and best practice knowledge? (include both patients and staff here)

Diversity and Inclusion:	
• Are a diverse range of patient voices included?	
• Who has difficulty accessing your services?	
• Whose voices are seldom heard?	
• Which minority groups are in your patient population? (Consider ethnic equality monitoring data that may be available).	
• Who is likely to be excluded?	
• Who can help you reach out to these people? e.g. local social inclusion office/ Healthy Ireland links/community resource centres.	
• Who needs to be involved in supporting, delivering and contributing to the project/work/committee?	
• Think about influence and interest: Use the templates below from the Health Services Change Guide to map your stakeholders.	
<p>Think about the information already available and avoid duplication</p> <ul style="list-style-type: none"> • What do you already know? e.g information from the National Patient Experience Survey • What information do you already have? • What do you not know- where are the gaps? 	

STEP 3: Choose degree/s of engagement and engagement method/s

Having identified the aims of your work and established who needs to be involved, your next step is to choose the appropriate degree/s of engagement and the engagement method/s. (See section 2).

Why are you asking patients to become involved? What are you asking them to do?
It could be more than one of the four degrees.

Degree 1: Inform:

Do you want to share information with patients about a health service, a health issue or a policy?

Yes/no? Why?

Degree 2: Consult/Listen:

Do you want to hear about a patient's

- personal experience of a service
- opinion regarding delivery of a service,
- recommendations for improving the service
- information provided
- health issue or policy

Yes/no? Why?

Degree 3: Discuss:

Do you want patients to discuss and deliberate healthcare services, issues or policies and begin to explore potential options and preferred solutions with healthcare staff?

Working together ensures that issues and concerns of patients and healthcare staff are heard, understood and considered.

Yes/no? Why?

Degree 4: Collaborate – work in partnership

Do you want patients, healthcare staff, healthcare planners and organisations to work in equal partnership, to find and implement solutions to healthcare issues, services or policies? At this level, people work together using a co-production/ co-design approach. There is shared responsibility.

Yes/no? Why?

Step 4: Inviting, selecting and recruiting patients (see pages 61-65)	
Invitation approach.	
Open invitation.	
Targeted invitation.	
Combination of open and targeted.	
What information will you include in your invitation?	
Do you have easy to understand, unbiased information regarding the context and aim of the engagement activity?	
Will you need to use an application form?	
Are there inclusion criteria for participants you need to consider?	
How will you select representatives if numbers interested exceed numbers requested e.g randomly select within the demographic of the population targeted?	
Step 5: The Engagement activity (see page 68 for further information)	
Do you have easy to understand, unbiased information regarding the context and aim of the engagement activity?	
Conduct the sharing expectations questionnaire with all participants prior to the kick-off meeting	
What are your ways of working / Terms of Reference? Co-design your ways of working with participants.	
Identify what supports patients and staff require in order to participate fully and meaningfully	

STEP 6. TIMESCALES Considerations:	
• What needs to happen and by when?	
• The duration of the engagement activity- short, intermittent or sustained.	
• The time commitment required – how many meetings, the duration of the meetings, the work and commitment required between meetings.	
• Time for invitation, response and recruitment process. Give advance notice of first meeting.	
STEP 7: Data	
• Consider data capture: how are you going to capture feedback / input e.g paper/ electronic questionnaires?; minutes from meetings; information from focus groups.	
• How are you going to analyse the data? How will different types of data be analysed together?	
• Who is going to analyse the data ?	
• How are you going to use the data?	
• How will you give feedback to the people who have been involved and to the relevant stakeholders? (see close-the-loop feedback template Appendix 19).	
Step 8: Evaluation of Engagement (see page 69 for resources)	
• When will you carry out evaluation?	
• How will you measure how successful the process of the engagement activity was?	
• How will you measure the quality of the engagement throughout the activity?	
• How will you measure the outcome of the engagement activity?	