



## Appendix 11

### Checklist for organisational requirements for embedding meaningful patient engagement as part of how we work.

This checklist is relevant for healthcare organisation, service, department or team leaders. Complete the checklist, identify the gaps and create an action plan for improvement.

	Yes	No	Some	N/A
<b>Commitment and Leadership</b>				
Do you have one or more people who are responsible for patient engagement in your hospital/ CHO/ service/team?				
Do you have an overarching commitment to engagement in your service?				
Is this commitment shared across all: <ul style="list-style-type: none"> <li>• Frontline staff</li> <li>• Managers</li> <li>• Governance</li> <li>• Volunteers</li> </ul>				
Do you have shared aims, values and guiding principles for engagement?				
Are patients and staff familiar with HSE values and guiding principles for engagement?				
Do you have a strategy for Patient Engagement?				
Is Patient Engagement a standing item on meeting agendas? Do you dedicate time at meetings to discuss patient feedback and recommendations?				
Do you include Patient Engagement in induction training?				
Do you include Patient Engagement in staff appraisals?				
Do you include Patient Engagement in governance?				
Do you use patients' input to help shape strategic goals and priorities?				
<b>Assessing readiness:</b>				
Do you have readiness assessment templates for Patient Engagement and for change available for all staff?				
Have you conducted an "as is" assessment of Patient Engagement?				

	Yes	No	Some	N/A
<b>Effective communication</b>				
Do you have a health literacy policy that all staff are aware of and using?				
Does your health literacy policy include: <ul style="list-style-type: none"> <li>Communicating Clearly guidelines?</li> <li>Plain English guidelines?</li> <li>Avoidance of the use of acronyms in written and spoken communication?</li> <li>Use of jargon busters where jargon needs to be used?</li> </ul>				
Do you have an interpreter service readily accessible in your service?				
Is there a question included on pre-admission/appointment information to ask if patients have any literacy needs?				
Have you /your team completed the National Healthcare Communication Programme modules / effective communication training?				
Do you record the number of staff who have completed the NHCP programme?				
<b>Communication pathways</b>				
Do you have a communication strategy that includes Patient Engagement? (see appendix 6.8)				
Do you have consistent messaging regarding the benefits of Patient Engagement and its importance?				
Do you have messaging to inform patients and the wider community of the opportunities to partner in your decision-making processes and how to get involved?				
Do you have a communication pathway within your team and across other teams who may be involved in your patients care?				
<b>Building in evaluation</b>				
Do you have a Patient Engagement evaluation process in place?				
<b>Training and education</b>				
<b>Have you an education/training programme for all staff which include the following?:</b>				
What Patient Engagement is, why it is important, what the benefits are.				
Cultural competence, attitudinal awareness.				
Effective communication skills as above.				
How to select and conduct meaningful PE activity/activities including: <ul style="list-style-type: none"> <li>The context and aim of the engagement activity for patients invited to engage.</li> <li>Clarity around roles and responsibilities of staff and patients involved in PE activities.</li> <li>How to evaluate PE.</li> </ul>				

	Yes	No	Some	N/A
Do you have a number of trained or experienced facilitators in group work in your organisation?				
Have you conducted a needs analysis regarding capacity building for Patient Engagement for your staff?				
<b>Policies and Procedures</b>				
Has your organisation developed messaging to inform patients and the wider community of the opportunities to engage in service design delivery and evaluation?				
Do you have an application process to respond to expressions of interest from patients and the wider community to engage/partner?				
Do you have a recruitment/interview process in place that can help identify patients/public to partner with a healthcare organisation?				
Do you have named mentors to support patients/wider community in partnering with a healthcare organisation outside meetings?				
Is there a process in place to act upon information /feedback you receive?				
Does your service/hospital/CHO have a process for “close- the -loop” feedback to inform those involved (patients and staff) in the engagement activity about the outcome of their input including if there is no impact?				
Do you have a process to invite patients to be active members of QI teams or other decision making committees?				
Do you have a patient forum/ patient experience advisory councils/boards?				
Are you adhering to the HSE expenses policy?				
Have you considered rewards for participation in Patient Engagement activities?				