Better Together
Health Services Patient Engagement Roadmap

Appendix 18

Evaluation and ReportingTemplates

Contents

SURVEY QUESTIONNAIRE FOR PARTICIPANTS:

HOW DID WE DO WHEN WE INVOLVED YOU?

This evaluation questionnaire has been adapted with permission from the DOH “Public Involvement Framework”. https://www.gov.ie/pdf/10806/?page=1. Their document was adopted with permission from the European Patients Forum “Value+ Toolkit”

You were recently involved in:

That took place at:

On:

Information	Yes	No	Some
Were you given enough information?			
Did we tell you what was going on?			
Did you understand the information?			
Did you know who to contact for more information?			
What could we have done better?			

Listening	Yes	No	Some
Were you treated with dignity and respect?			
Did you feel your views and opinions were listened to?			
Did you feel we took your views & opinions seriously?			
What could we have done better?			

Taking part	**Yes**	**No**	**Some**
Did you know what to expect from us?			
Did you know what was expected from you?			
Did you feel able to take part?			
What could we have done better?			
What your involvement means	**Yes**	**No**	**Some**
Did you feel you were able to influence the decisions taken?			
Did you feel able to take part?			
Overall did you feel it was worthwhile taking part?			
Is there anything else you would like to tell us?			
Would you choose to be involved again?			
Have you any suggestions regarding training that would have been useful for you?			
Thank you. **Your comments are anonymous.**			
Please return to: (Insert address)			

Engagement Activity Experience Feedback Form

Name of engagement activity:

Please complete this short questionnaire regarding your experience of your engagement activity.

What worked well?
What did not go well?
What could have been done differently to make this a better experience for you? What would make this a better experience for other patient/staff representatives?
Thank you for your time in completing this evaluation.

Engagement Activity Evaluation

Step 1: Establishing the aims	**Met (2)**	**Partly met (1)**	**Not met (0)**
Clearly state the aims of the project/work.			
Clearly identify the aims of engaging with patients in the project/work (able to identify why engagement was important to the outcome).			
The engagement activity was mutually beneficial i.e resulted in improved services/ improved safety/improved patient experience.			
Step 2 : Who needs to be involved and why?			
The patients involved represented those who will be affected by, will benefit from, be impacted by the project/work.			
The patients involved represented the diversity of the population affected by the project/ work e.g gender, ethnicity, age.			
The patients involved represented the minority groups and those whose voices are seldom heard or who have difficulty accessing services who will be affected by the project/work.			
You identified those who could help you reach out to the minority groups and those whose voices are seldom heard or who have difficulty accessing services who will be affected by the project/work- e.g. identified champions in the community etc.			
You identified who needed to be involved in supporting, delivering and contributing to the project/ work.			
There was 50:50 ratio of staff to patients in the group (include no. here).			
Step 3: Choosing the degree of engagement/s			
The appropriate degree/s of engagement were chosen.			
The appropriate method/s of engagement were chosen.			
Step 4: Invitation, selection, recruitment			
The invitation approach used was successful.			
The information included in the invitation was easy to read, unbiased and clearly informed the potential participants about the context of the work and the aim of the engagement activity.			
The purpose of and promise about engaging patients was made clear.			
The selection process chosen was fair and transparent and communicated clearly to those who registered interest in being involved.			
A recruitment process was used where appropriate.			

Step 5: The Engagement Activity	**Met (2)**	**Partly met (1)**	**Not met (0)**
Appropriate resources used according to budget i.e Patients and staff time and resources (venue, administration, and access) were respected and used effectively as defined in the agreement/ terms of reference/ engagement plan.			
Easy to understand, unbiased, timely, accurate, accessible information regarding the context and aim of the engagement activity was provided for all involved.			
All parties were involved in identifying what the patient contribution should be and how and where the patient could most effectively be involved.			
The sharing expectations questionnaire was completed and returned by all participants before the kick-off meeting.			
There was induction and training for all parties about each other's roles and special expertise.			
There was induction and training about the communication methods which would support both patient involvement and communication throughout the project/work.			
Staff were trained and capable of supporting effective engagement.			
The promises made to patients about their engagement were kept.			
The Terms of Reference			
The terms of reference were co-designed with and agreed by the group.			
Roles and responsibilities were communicated clearly, understood and accepted.			
Affected groups and communities were kept up to date of issues.			
Decision-makers were prepared for and responsive to patients' views.			
The plan included a strategy for communication between all parties and a strategy for supporting patient engagement.			
There was agreement about how each party would fully participate in decisions, about what should be presented at full meetings and which topics were better suited to specialised sub-groups/work-streams (if appropriate).			
Supports required for patients and staff in order to participate fully and meaningfully were identified and provided.			
Mentoring was provided for the patients.			
Opportunities to create shared outcomes were provided.			
There were opportunities to build working relationships through formal and informal activities.			

Step 6: Timescales	**Met (2)**	**Partly met (1)**	**Not met (0)**
The duration of the engagement activity was identified.			
The timeframe identified was adhered to.			
The time commitment required was established and agreed.			
Adequate time was allocated for dissemination of the invitation and responses to be submitted.			
Step 7: Data			
The data to be captured was agreed.			
How the data was to be analysed was agreed.			
How the data was to be used was agreed.			
How feedback was to be communicated to those involved was agreed with input from the participants.			
Feedback was provided on how patient input influenced decision made and outcomes.			
The patients were kept informed about the work /project after their involvement had ended, and about the impact of the project/work results after the development process was over.			
Step 8: Evaluation of engagement			
Timeframes for evaluation were agreed.			
Outcome measures were agreed by the group.			
Opportunities to evaluate the process were provided.			
The design and implementation of the process were effective.			
The expected outcomes of the process were achieved.			
The quality of the engagement experience was monitored throughout the activity (e.g what worked well, even better if).			
The evaluation described how patient engagement shaped the work/project and achieved more than a similar outcome without patient engagement.			
The evaluation included the impact of the experience of the engagement activity on the patients and on the other parties.			
The evaluation identified the impact of the work/project on healthcare services.			
Total score: /106 (maximum)			

Engagement Activity Evaluation: Summary

List the actions which were partly met/not met.
Identify the learning from what was met and why and what wasn’t met and why.
Identify what supports/training/changes need to be made in order to meet those actions in future engagement activities.

Engagement Activity Short-term and Long-term outcomes evaluations

Engagement activity short-term outcome evaluation	**Yes/No**	**Comment**
The decision-making process was strengthened		
Relationships among patients and staff were enhanced		
Patients and staff had enhanced engagement skills		
The engagement experience was enjoyable /positive for patients and staff		
Patient’s perspectives helped to shape their own healthcare plan/ healthcare service design, delivery and evaluation/ healthcare policy		
Engagement activity long-term outcome evaluation		
The health status of the population affected by the decision was improved		
The quality of care delivered for the patients affected by the decision was improved		
The experience of care for patients affected by the decision was enhanced		
The cost of healthcare provided was curtailed or reduced		

Patient Engagement Activity Report

Name of the project/working group/ service etc	
Name of the Lead/s	
Date from, to.	
Did you have a budget for patient engagement?	
What was the background to the work/project being undertaken, including the aims?	
What were the aims of engaging patients in the work/project/ service?	
Who did you involve and why?	
Which degree/s of engagement did you choose and why?	
What engagement method/s did you use? (attach documents used e.g surveys / Terms of reference etc).	
What invitation approach/es did you take? (attach the invitations/ advertisements used).	
How did you select the patients?	
What recruitment process did you use, (if applicable)?	
How many patients were involved in the project/service?	
Did you use any incentives to encourage patients? If yes, which did you use? (e.g.tokens etc)	

What communication plan did you devise for the engagement activity? (include same here)	
What timeframes did you use?	
What data did you capture and how did you capture and process it?	
How did you evaluate the engagement activity process?	
How did you evaluate the impact of the patients contribution to the project/work/service?	
What was the outcome of the patient engagement activity?	
How did the involvement of the patient contribute to the project?	
What was the patient's experience of the engagement activity?	
How did you communicate the impact of the patient's input on the decisions made to those involved and the wider community?	

What worked well?	
What were the enablers?	
What didn’t work? What were the barriers?	
What would you do differently?	