

Checklist - Health Care Partner Readiness

Including patient partners in your work can provide a unique perspective to any decisions being made. Below are a number of questions you may want to ask yourself before moving forward with engaging patients in this initiative to ensure that patient partners are prepared and supported to participate in a meaningful manner.

- Can you fully articulate the aim and patient roles at this time? Patient engagement opportunities have the most impact when the overall aim of the engagement and roles/expectations of patient volunteers can be communicated early on.
- Do you have support and buy-in from key leaders, decision-makers, and/or committee members who are directly involved in this opportunity? If not, do you have a plan in place to address and build commitment amongst key stakeholders?
- Do you have background documents (e.g. Terms of Reference and past meeting minutes) that you can share to allow volunteers to better understand the goals, priorities, and current focus of this work?
- Privacy and confidentiality are important to both patients and health care partners. Do you have a confidentiality agreement that patient volunteers will sign prior to participating? Do you have a way to emphasize to patient partners that their input and perspectives will remain privileged within this opportunity?
- Within your organization, is there a defined 'point person' who will communicate with and support patient partners throughout this engagement? Support may include providing meeting invitations, sending key documents, and initial conflict resolution as appropriate.
- It is expected that patient partners are able to volunteer without incurring extensive out-of-pocket expenses. What resources do you have available to support patient partners, and which expenses will be covered?
- Do you have an early plan regarding how you will "close-the-loop", or share key results or outcomes that patient partners contribute?

Please keep these questions in mind when completing the engagement request form.

Would you like more information or support with some of the questions above? [PVN engagement leaders](#) will be happy to connect with you!