



# Opportunity Preparation Checklist

Including patient partners in your work can provide a unique perspective to any decisions being made. Please use this checklist to help you think about what you need before moving forward. These supports help ensure patient partners are prepared and supported to participate in a meaningful way.

- Can you fully explain the aim of your initiative 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 partners can be communicated early on.
- Do you have support 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 your team?
- Do you have background documents? (e.g., Terms of Reference and past meeting minutes) Sharing these documents allow patient partners to better understand the goals, priorities, and current focus of this work.
- Do you have a confidentiality agreement that patient volunteers will sign prior to participating? Privacy and confidentiality are important to both patients and health care partners. Do you have a way to emphasize to patient partners that their input and perspectives will remain privileged within this opportunity?
- 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.
- Can your team support out of pocket expenses? (e.g., Travel costs) We encourage you to cover any out-of-pocket expenses for patient partners. What resources do you have available to support patient partners, and which expenses will be covered?
- Do you have a plan on how you will share key results or outcomes that patient partners contribute? Patient partners are keenly interested in knowing how their input is influencing the improvements made. Have a plan for that is critical to demonstrating your commitment to meaningful involvement.

Your Engagement Leader is available to support you. You can reach us at [pvn@bcpsqc.ca](mailto:pvn@bcpsqc.ca) or 1.877.282.1919

**PVN is a community of patients, families and caregivers working together with health care partners to improve BC's health care system.**