



Successful patient engagement involves planning and preparation! You are now ready to connect with the patient partners using the contact information an Engagement Leader shared with you. This is commonly done by teleconference and usually takes 30 minutes.

## Preparation Session

The preparation session is held prior to patient partner(s) confirmation and participation. It's a chance for you and the patient partner(s) to meet, review information, set the scope and expectations and answer questions. The final step is for you and the patient partner to identify if they bring the experiences you are looking for and if they want to continue be involved.

## Suggested Agenda

- Introductions:
  - Introduce yourself - describe your role with the health region and project.
  - Ask the patient partners to introduce themselves and briefly share their interest.
- Overview of opportunity:
  - Review information shared in the invitation as well as any additional information or updates (terms of reference, charter, previous minutes)
  - Share who the other members of the team are and their role.
  - Discuss role and expectations including confidentiality.
- Logistics – Review the following:
  - Date/time/location of the event or first meeting.
  - Parking – Where to park, ask if wheelchair accessibility is required.

- Is the location difficult to find?  
Consider meeting the patient partners in a common area and escorting them to the meeting.
- Expenses – Review what is covered and how are expenses reimbursed (please note that PVN does not cover expenses), usual expenses include mileage, parking, overnight accommodation, and meals if needed.
- No scent policy (if applicable).
- Questions – allow an opportunity for any questions.

## Next Steps

- Confirm participation - In some cases a decision is made on the call. If not, please ask everyone to email their Engagement Leader with decision if they want to be involved.
- Planning/Communicating – The health care partner communicates directly with the patient partners regarding next steps such as meeting details and agenda.
- Engagement Leader will check in periodically, feel free to contact if you require additional support or have questions. If at any time a patient partner chooses to step down or is not a good fit for the group, please inform the Engagement Leader and discuss a replacement.
- Evaluation – You will receive periodic evaluations from PVN.
- Outcomes – Don't forget to share outcomes with us periodically or at completion.

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