**Instructions**

* ***Delete this paragraph*** and other instructional text in green font before sending to patient partners.
* This template is intended for use by health care partners when an engagement opportunity has concluded, or, when a patient partner has completed their term or resigned.
* The intended recipient(s) of this document are the patient partners.
* Edit the Header above to include the name of your Engagement Opportunity.

**Background Info**

* Engagement/Initiative Name:
* Health Care Partner (Name/Dept/Org):
* Patient Partner Name(s):
* Time Frame of Engagement:
* Today’s Date:

**Initiative Summary**

Note: “Initiative” refers to the health system project/work/committee that the engagement was connected to.

**Initiative Aim**

What was the aim or goal of this initiative?

**Initiative Outcomes**

Has the aim of the initiative been met? What changes, decisions, contributions or deliverables have been made in the health system (i.e., a new policy, pamphlet, report, clinic, decision, etc.). If the work is ongoing, please provide a short summary of the progress achieved to date. Are there any supporting documents that can be shared? If so, please provide a link or attach additional documents.

**Initiative Impacts**

Is there any data or anecdotal indication of how this initiative has impacted things like quality of care, patient experience, clinician experience, cost savings, patient or population health outcomes?

**Patient Engagement Summary**

Note: Engagement refers to patient partner participation, via specific activities, in the initiative described above.

**Engagement Aim**

What was the purpose of engaging patient partners in this work? What was the patient partners’ role?

**Engagement Outcomes**

What did you hear or learn from working with patient partners? Are there examples of feedback or contributions?

**Engagement Impact**

In what ways did the participation and contributions of patient partners influence the initiative? If possible, please provide at least one concrete example.

**Extra Reflections**

Is there anything else you’d like to share about what you have learned from working with patient partners and/or the engagement process? Might this engagement lead to additional engagement opportunities in the future?

**Staying In Touch**

How can patient partners stay in touch with you and/or learn more about the initiative’s progress going forward?

**Thank you!**