

Patient Engagement Planning Canvas

This tool will help you work through the main considerations you need when planning to engage with patient partners. Use this as a space to reflect, generate ideas, and refine your thinking.

Why Engage?

Engagement Aims

What are the main reasons for wanting to engage patient partners? What do you hope to learn? What are the beneficial outcomes for your work?

1.
2.
3.

Background Information

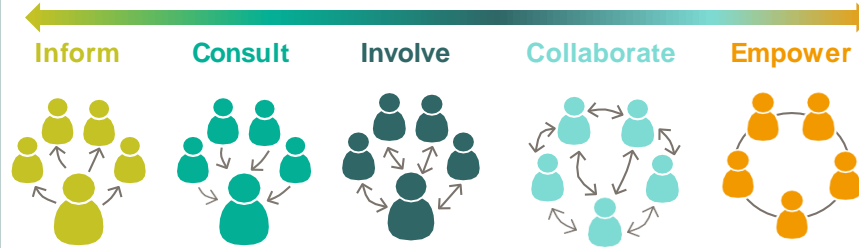
What is the relevant history and background information for your engagement opportunity?

How Are You Engaging?

Level of Engagement

Circle the appropriate level of engagement based on your aims.
[Adapted from the International Association for Public Participation, Canada;](#)

IAP2 Spectrum of Public Participation



METHODS OF ENGAGEMENT

What methods will you use to engage patient partners?

Role of the Patient Partner

What role will the patient partner have in your engagement opportunity? e.g., advisor, member, participant, speaker, etc.

Readiness

- What decisions have already been made? What's open for discussion?
- How are you making this inclusive and accessible?
- Will you be engaging with Indigenous patient partners? If yes, how will you embed cultural safety & humility into the work?
- Is there a risk that patient partners may face emotional distress by sharing their experiences? If yes, what supports will you provide?

Who? (Eligibility Criteria)

What are the characteristics of the people you want to engage with? What skills/experiences/expertise is required or would be an asset?

Resources Required

What things (staff, money, external supports, etc.) do you need to make this happen? What resources do you have to support patient partners & what expenses will be covered, including compensation of time?

How Will You Evaluate?

Evaluation Questions Based on engagement aims	Data Source Where will you find the information?
1.	
2.	
3.	



Your Roadmap For Engagement & Closing The Loop

What are the timelines and phases of your engagement work? Are there specific activities within each phase? After each activity, how might you follow up with patient partners to share information back with them and Close the Loop e.g., by demonstrating the meaningful impact that resulted from their participation?



Project Team

Who is on your team? What role will they play? And who will be the main point person for the patient partner(s)?

Additional resources for your engagement planning include:

- [A Guide to Authentic Patient Engagement](#)
- [BCCDC Covid-19 Language Guide](#)
- [Committee Principles & Guidelines](#)
- [Culturally Safe Engagement](#)
- [Diversity, Equity & Inclusion](#)
- [iAP2 Spectrum of Public Participation](#)



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