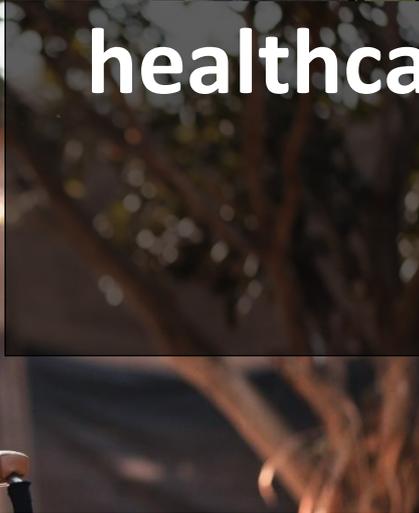




# Guide for consumers to self-assess the quality of their engagement in healthcare organisations



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## How to use this Guide

This guide is for consumer representatives or advisors **to self-assess the quality of their engagement in healthcare organisations**. The guide has three sections with tools and resources that will help you to assess your engagement in a health service or healthcare organisation.

Firstly, the [set of skills and knowledge](#) that consumer representatives or advisors need to perform their representative and advisory role.

Second, [self-assessment tools](#) to assist consumers to assess their own skills and knowledge and how they can enhance their capacity to fulfill the consumer representative or advisor roles.

Finally, a [Training Needs Assessment \(TNA\) Guide](#). This TNA Guide includes a competency assessment table ([See Table 1](#)) which outlines the diverse levels that consumers may assess themselves to be in their engagement journey from introductory, to intermediate or advanced levels. The Training Needs Assessment also lists a series of training topics that would support consumers to develop the skills and knowledge they need according to their level of competency.

## Skills and knowledge

The set of skills and knowledge that consumers in leadership roles need to perform their representative and advisory role is vast and varied. Some of the skills and knowledge are listed below. Please see [Table 2](#) for a list of potential topics consumer representatives or advisors may want to become familiar with to enhance their performance on committees.

**Skills** related to effective engagement:

- improving the quality and safety of health services through partnerships with health services
- effective committee work (time management, keeping personal diary, etc.)
- influencing decision making
- looking after oneself
- raising awareness and advocacy
- awareness of diversity in the community
- helping organisations get to know and form partnerships with its community
- co-design and co-production

**Knowledge** of:

- consumer engagement definitions, rationale, principles, evidence and policy context.
- the main frameworks and pillars of consumer engagement (human rights-based approach to health care),
- social inclusion and diversity in the community and community development
- consumer rights
- definitions and principles of health literacy
- clinical governance terminology and frameworks
- research methods and data analysis
- security and confidentiality guidelines
- an understanding of the Australian health care system.

## Self-assessment tools

This guide includes three self-assessment tools to assist consumer representatives or advisors to self-assess their current level of engagement. As a consumer representative or advisor you can use these tools to assess how you can enhance your capacity to fulfill the roles you are performing in a health service. The self-assessment tools will also support you to assess your performance, clarify your role and ascertain areas for improvement and capacity development.

All the self-assessment tools are designed to be used on an ongoing basis so that you can engage in a cycle of continual monitoring of your performance in your role.

The self-assessment tools are for your own use in developing your capacity and enhance your performance as a consumer representative or advisor. The completed tool is confidential and is therefore not required to be shared with the health service, or committee with whom you work. However, your answers will help you identify areas for improvement or useful topics to discuss with relevant health service staff, or governance body members with whom you are working. Addressing areas for improvement and discussing these topics will not only support your skills and knowledge development, but also will improve the effectiveness of your working relationships and the effectiveness of your contribution.

The following descriptions will help you decide which assessment tool is the most relevant to complete.

1. The ['emerging' consumer self-assessment tool](#) is designed to be used for consumers to assess their engagement at the earliest stages of the continuum. This is, for consumers who are invited to be engaged as 'expert patients' or carers because of their personal experience of using health services and to make a contribution as a consumer contributor, representative or advisor based on that experience.
2. The ['evolving' consumer self-assessment tool](#) is designed as a tool for consumers assessing their engagement as policy advisor, educator, and community mobiliser. The consumer uses an advanced set of skills and knowledge to influence change and engage with communities.
3. The ['experienced' consumer self-assessment tool](#) is designed to assess the engagement of consumers as experts, policy influencers, co-designers and deliverers of projects. As such they are expected to provide guidance, support troubleshooting and answer questions that relate to their role and areas of expertise.

## Self- assessment tools

### Emerging consumer self-assessment tool

This self-assessment tool may help you in determining your goals and readiness as a consumer representative or advisor and the role you have recently decided to undertake.

This tool would be useful if your role is defined as “emerging” because you have common knowledge or an understanding of consumer engagement. This knowledge is based on your personal experience gained by being an “expert patient” or carer, but also by being in the role of a consumer contributor, representative or advisor in a health service or at Safer Care Victoria.

You may want to revise these questions every six months to help you in developing the role as you go.

Why did I choose to be involved as a consumer? (Past experiences - either good or bad)	
Have I had sufficient time since my experience (or that of my family member) to be able to work on these issues in an objective way?	
What do I bring to this activity? (Ideas, information, knowledge, skills, experience)	
What do I want to achieve from my engagement as a consumer?	
What type of support do I need? Training, resources, or maybe a mentor?	
How do I think the organisation will benefit through consumer involvement?	
Do I understand the time commitment expected of this role and have I allocated enough time for the required tasks?	
Describe what you see as your role and responsibilities in this consumer representative or advisor position	

This self-assessment tool was modified from a version first developed by Health Issues Centre in 2013 for Cancer Australia and revised in 2021.

## Evolving consumer self-assessment tool

This self-assessment tool may help you review your role as policy advisor, educator and community mobiliser. Your role is defined as “evolving” because you are able to use an enhanced set of knowledge and skills, apply these to new situations and also because you are able to influence change and engage with communities.

These are Yes/No questions but there is room to take notes and expand your answers if you wish to do so.

You may want to revise these questions every six months to help you in developing the role as you go.

Consumer experience	Yes	No	Unsure
Do you have personal experience with the health services system? (e.g., as a patient, carer, interested community member)			
Do you have a strong sense of what has worked well in your health care experience and what hasn't?			
Have you had any previous experience as a consumer representative or advisor on a committee?			
Comments:			

Consumer motivation	Yes	No	Unsure
Do you feel that your experience and knowledge is appropriate for the role you're taking on as a consumer representative or advisor?			
Do you know what kind of skills you might need for your participation to be effective? You could nominate a few in the comments section			
Comments:			

Consumer capability to meet the environment	Yes	No	Unsure
Do you feel that you understand the important issues that are relevant for this role?			
Do you think more training would be useful for improving your understanding?			
Do you have the time and willingness to pursue further training to meet the needs of this role?			
Comments:			

<b>Consumer's understanding of context</b>	<b>Yes</b>	<b>No</b>	<b>Unsure</b>
Do you understand the way the health service you are working with fits into the broader health context?			
Have you been provided with information about other types of consumer engagement in the organisation?			
Comments:			

<b>Learning and development</b>	<b>Yes</b>	<b>No</b>	<b>Unsure</b>
Has the health service you are involved with provided you with an effective orientation including roles and responsibilities of both consumer and service provider representatives?			
Has the health service you are involved with provided you with professional development opportunities?			
Are there specific knowledge areas that you need to improve in order to participate more fully in your health service? [You could think of skills and knowledge that you currently don't have but that may be useful to have and approach the health service to support you to acquire these. You can write your thoughts in the space below. To do this you can use the Training Needs Assessment Guide provided below]			
Have you been offered opportunities to write or speak about consumer involvement or participate in conferences?			
Comments:			

<b>Consumer support networks</b>	<b>Yes</b>	<b>No</b>	<b>Unsure</b>
Have you been offered assistance/reimbursement for any related expenses?			
Are you in contact with consumer networks and organisations outside the health service you're working with?			
Do you have a clear sense of the ongoing needs and concerns of the consumers within your network or consumer organisation?			
Comments:			

This self-assessment tool was developed by Health Issues Centre in 2013 for Cancer Australia, November 2013 and has been reviewed in 2019, 2020 and 2021.

### Experienced consumer self-assessment tool

This self-assessment tool may help you to review your performance in terms of the role as a consumer who is known as an expert in consumer and community engagement. You are seen as a policy influencer, co-designer, decision-maker and deliverer of projects; and you are expected to provide advice, guidance, troubleshoot and answer questions related to your role.

This self-assessment tool is particularly useful if you are engaged in the governance of an organisation or an organisational committee.

Orientation	0 Not useful	1 Limited usefulness	2 Useful	3 Very useful
How do you rate the usefulness of the orientation to your role and responsibilities as a consumer representative or advisor?				
What changes could be made to the orientation process to make it more useful?				

Role of consumer representative or advisor					
Do you think your role of the consumer representative, or advisor is well understood by:					
	1 No understanding	2 Some understanding	3 Good understanding	4 Excellent understanding	5 Unsure
Yourself					
The Board					
Health services management					
Health Service staff					
Consumers of the health service					
Community					

**Effectiveness of the role**

Are you aware of any actions, or changes that have occurred as a result of the advice or recommendations you have made to the health service?

If yes, please give details

If no, please make any comments

Details/Comments

**Relationship with consumers and community members**

	1 No links	2 Some links	3 Good links	4 Excellent links
As a consumer representative or advisor, I have links with consumers and community groups				
			YES	NO
Have you had opportunities to learn from, communicate with and/or consult with various consumers/consumer groups during your engagement with a health service?				
Have you received reports and presentations from health service staff about their consultation with consumers or patients				
Have you had opportunities to participate in consultations with patients/consumers/community members				
Have you had opportunities to attend meetings with local community groups or organisations				
Have you had opportunities to attend meetings with other consumer representatives or advisors in the health service				
Have you received information from other consumers representatives or advisors about their work with patients or the broader community				
Please make any comment to elaborate on your responses. This will help you to reflect on areas of improvement in your role and if you need support to improve your performance as a consumer representative or advisor				

<b>Meeting structure and process</b>				
	0 Strongly disagree	1 Disagree	2 Agree	3 Strongly agree
Information relevant to the meeting has been provided in sufficient time prior to the meeting to enable my consideration and proper evaluation  Comments:				
I am able to readily share my ideas and opinions during meetings  Comments:				
The discussion at meetings is inclusive of the views of consumers  Comments:				

<b>Barriers to participation</b>	
Identify any key barriers to your participation in the health service meetings? [select as many as apply]	
There are too many items on the agenda	
There are dominant voices at the meeting which are not managed effectively	
Complexity of information and language used about matters to be discussed	
It is unclear how my contribution and input are influencing decisions by the health service	
There is little follow-up, action and/or feedback of matters I raise at meetings	
Other	

**Support for consumer representatives or advisors**

Identify three key aspects that you think can be introduced/or strengthened to support the on-going work of consumer representatives or advisors.

Consumer engagement, policy or strategy				
Overview of health service relationship and funding with government/other key agencies/funders				
Terms of Reference for the role of the consumer representative or advisor				
On-going information of some of the key programmes and services where consumer engagement is a key and integral element				
Building networks with other consumer representatives or advisors				
Other				
	0 Strongly disagree	1 Disagree	2 Agree	3 Strongly agree
I have adequate support from the health service staff in charge of consumer engagement				
Comments:				

**Achievements**

Can you identify three major contributions you have made in your role as a consumer representative or advisor in the past 12 or 24 months?

Describe:

This self-assessment tool was developed by Health Issues Center in 2015 and has been revised in 2018, 2020 and 2021.

## Table 1. Training Needs Assessment (TNA) Guide

This training need assessment guide includes a competency assessment table which outlines the diverse levels that consumers may assess themselves to be in their engagement journey from introductory, to intermediate or advance levels.

**Introductory:** the consumer has common knowledge or an understanding of basic skills and knowledge of consumer engagement. The knowledge is gained by being in the role of a consumer representative or advisor. The consumer is expected to need some help when performing these skills.

**Intermediate:** the consumer is able to successfully complete tasks in relation to consumer engagement and leadership as requested. Help from an expert may be required from time to time, but they can usually perform the skill independently.

**Advanced:** the consumer is known as an expert in this area. They can provide advice, guidance, troubleshoot and answer questions related to this area of expertise and the field where the skill is used and may have useful professional and technical skills and expertise that can add value to their role.

The Training Needs Assessment guide also lists a series of training topics that would support you to develop the skills and knowledge you need according to your level of competency.

### **How to use the training needs assessment guide?**

To be able to select which training you need, firstly identify which level of knowledge (competency) you have in relation to consumer engagement: introductory, intermediate or advanced. Then, you can select the training topics that will be useful to enhance your role as consumer representative or advisor

INTRODUCTORY LEVEL	COMPETENCY
<p>You have common knowledge, or an understanding of basic skills and knowledge of consumer engagement and the level of experience gained by being in the role of a consumer representative or advisor. You are expected to need some help when performing these skills.</p>	<ul style="list-style-type: none"> <li>▪ Focus on learning</li> <li>▪ Focus on developing through on-the-job experience</li> <li>▪ You understand and can discuss terminology, concepts, principles and issues related to this competency</li> <li>▪ You utilise the full range of reference and resource materials in this competency.</li> </ul>
<b>TRAINING TOPICS</b>	
<ul style="list-style-type: none"> <li>▪ How the health system works in Australia?</li> <li>▪ Definitions, policy context and history of consumer participation</li> <li>▪ The evidence and rationale for consumer participation</li> <li>▪ Terminology: ‘consumer nominee’, ‘consumer representation’ and ‘consumer perspective’</li> <li>▪ The role of consumer representatives on committees</li> <li>▪ Quality and safety in healthcare</li> <li>▪ National Safety and Quality Healthcare Standards (NSQHS) Standard 2: Partnering with consumers</li> <li>▪ Safer Care Victoria: Partnering in healthcare framework</li> <li>▪ How to get the most out of online meetings</li> <li>▪ Communication and negotiation skills</li> </ul>	

INTERMEDIATE LEVEL	COMPETENCY
<p>You are able to successfully complete tasks in relation to consumer engagement and leadership as requested. Help from an expert may be required from time to time, but you can usually perform the skill independently.</p>	<ul style="list-style-type: none"> <li>▪ Focus is on applying and enhancing knowledge or skill</li> <li>▪ You have applied this competency to situations occasionally while needing minimal guidance to perform successfully</li> <li>▪ You understand and can discuss the application and implications of changes to processes, policies, and procedures in this area.</li> </ul>
<p><b>Training topics</b></p>	
<ul style="list-style-type: none"> <li>▪ Consumers' own expectations and clarity about their role as consumer representatives or advisors</li> <li>▪ How to be an effective consumer or community representative</li> <li>▪ Assessing own engagement as a consumer representative</li> <li>▪ The Safer Care Victoria Community Advisory Committee (CAC) Guidelines</li> <li>▪ How to be an effective member of a Community Advisory Committee (CAC)</li> <li>▪ Self-assessment for Community Advisory Committee (CAC) members</li> <li>▪ Group dynamics and conflict management</li> <li>▪ Perception of health practitioners about consumer engagement</li> <li>▪ Consumer leadership</li> <li>▪ Engaging with the community</li> <li>▪ Public presentation skills</li> <li>▪ Advocacy and types of advocacy</li> <li>▪ Identifying key stakeholders for advocacy</li> <li>▪ Effective storytelling and storytelling for quality improvement</li> <li>▪ Influencing decision makers</li> </ul>	

ADVANCED LEVEL	COMPETENCY
<p>You are known as an expert in this area. You can provide advice, guidance, troubleshoot and answer questions related to this area of expertise and the field where the skill is used.</p>	<ul style="list-style-type: none"> <li>▪ Focus is strategic</li> <li>▪ You have demonstrated consistent excellence in applying this competency across multiple projects and/or organizations</li> <li>▪ You are considered to be the “go to” person in this area within and/or outside organizations</li> <li>▪ You create new applications for and/or lead the development of reference and resource materials for this competency</li> <li>▪ You are able to diagram or explain the relevant process elements and issues in relation to organizational issues and trends in sufficient detail during discussions and presentations, to foster a greater understanding among internal and external colleagues and constituents.</li> </ul>
<p><b>Training topics</b></p>	
<ul style="list-style-type: none"> <li>▪ Consumer engagement in the implementation of national quality and safety standards</li> <li>▪ Peer support and how to establish and manage a peer support group</li> <li>▪ Social media and advocacy</li> <li>▪ Engaging with diverse and seldom heard communities</li> <li>▪ Health information and health literacy</li> <li>▪ Assessing written and online health information</li> <li>▪ The human rights-based approach to health care</li> <li>▪ Co-production</li> <li>▪ Advanced governance: corporate and clinical governance</li> <li>▪ Clinical governance</li> <li>▪ Patient-centred care</li> <li>▪ Consumer engagement in research</li> </ul>	

This table was developed by Health Issues Centre for Safer Care Victoria in October 2019 and was revised in 2020.

## Table 2: Consumer engagement and leadership skills and knowledge

Below is a table of some of the consumer engagement and leadership skills and knowledge that consumer representatives and advisors engaged in health services governance and organisational committees are expected to have to perform effectively in their roles.

These topics may be helpful starting points in discussions with the committee secretariat and/or Chair and other consumers to determine what skills and knowledge you may require performing effectively in the specific role you have been assigned.

Consumer engagement and leadership skills and knowledge
<b>Getting involved</b> Reasons why people get involved with health organisations, government bodies or services.
<b>Definitions, rationale, principles, evidence, and policy context</b> Definitions and rationale of consumer engagement, evidence and principles of consumer engagement, and state and national policies and international evidence.
<b>Pillars of engagement</b> The human-rights-based approach to health, consumer rights, social inclusion and community development.
<b>Health literacy</b> Principles of health literacy, attributes of health literate organisations and health literacy in the community.
<b>Co-design and co-production</b> Best practice for implementation of co-design projects with consumers and community members.
<b>Clinical governance</b> Definitions, frameworks and best practice to becoming an effective consumer representative on a Board or clinical governance committee.

**Australian health care system**

The structure and function of the Australian health care system, health care funding and service delivery, and the roles of governments and public and private sector providers.

**Committee work**

Chairing committees, taking minutes, communications skills (verbal and written), working together, problem solving and understanding group dynamics. Meeting procedures, and governance principles and practice

**Influencing decision making**

Influencing decision making processes, negotiating skills (including using a “win-win” approach), achieving consensus, avoiding conflict, and shared decision-making processes.

**Looking after yourself**

Planning for consumer leadership role, managing time and commitments, setting boundaries, gaining support for an issue and looking after yourself.

**Raising awareness and advocacy**

Approaches to advocacy, advocating to decision-makers, designing campaigns and creating support for an issue, storytelling and ideas for mobilising communities.

**Improving the quality and safety of health services**

Utilising feedback from consumers and undertaking consultations with the community.

**Helping health services, organisation and government bodies get to know and form partnerships with their community**

Conducting community research and working with community researchers, inform and advocate to communities more broadly and specifically to consumer peak bodies.

**Awareness of diversity in the community**

Issues of representation and diversity in the community, strategies to identify diversity in the community and identifying key stakeholders to work with to improve access and equity.