



Health Issues Centre
Consumer voices for better healthcare



Consumer recruitment and support. Train the Trainer (TTT) Toolkit



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Introduction

This **Consumer Recruitment and Support. Train the Trainer Toolkit** was developed by Health Issues Centre with funding from Safer Care Victoria to support the staff of health services to train others in the organisation to recruit and support consumers engaged in governance and organisational committees.

This Toolkit is designed to be used in conjunction with the **Consumer Recruitment and Support Train the Trainer. Manual**. The **Manual** contains basic information that will help staff to train others in the organisation and includes information about adult learning principles and barriers to adult learning, how to design and implementing the program, how to write learning objectives and how to assess the program.

How to use this Toolkit

To develop and implement a train the training program to recruit and support consumers engaged in the governance and organisational committees in your organisation, you need to have strong foundations such [consumer engagement policies, frameworks and plans](#). This will ensure that you are recruiting consumers to organisational structures that rely on leadership commitment and the necessary structures to support them in their role, and avoid tokenism. An [organisational self-assessment or readiness checklist](#) will help you assess the readiness of the organisation to recruit and support consumers engaged across the organisation.

Once you have ensured that the relevant policies and frameworks are in place and you have assessed the readiness of the organisation to engage consumers in governance and organisational committees you – and staff you are training through this Train the Trainer Program - may start the process of recruitment of consumers. A series of [recruitment tools and templates](#) and [support resources](#) are available in this Toolkit.

Attachment include:

[Attachment 5 Recruitment Process](#)

[Attachment 6 Consumer position advertisement template](#)

[Attachment 7 Position description – SAMPLE](#)

[Attachment 8 Expression of interest/ Application form](#)

[Attachment 9 Interview guide for consumer positions – SAMPLE](#)

[Attachment 10 Consumer Recruitment – Selection criteria](#)

[Attachment 11 Letter for successful candidates – Sample](#)

[Attachment 12 Letter for unsuccessful candidates – Sample](#)

Support resources include:

[Attachment 13 Induction/ orientation kit for consumers on health service committees - Sample](#)

[Attachment 14 Consumer self-assessment tool](#)

[Attachment 15 Consumer self-assessment checklist](#)

[Attachment 16 Training, coaching and mentoring](#)

[Attachment 17 Other support for consumers on committees](#)

Consumer engagement policies, frameworks and plans

Every recruitment of consumers to organisational governance or committees should be within the context of an organisational commitment to consumer engagement. This commitment is usually demonstrated by having a clear consumer engagement policy, a consumer engagement framework, a consumer engagement plan, and a consumer remuneration and reimbursement policy.

A **consumer engagement policy** outlines the overall commitment and vision for consumer engagement of the organisation and how the policy relates to other organisational policies. It is a document that describes the long term aims and objectives, accountability and reporting requirements, the stakeholders (internal and external) and the resources available to support consumer engagement in the organisation. A consumer engagement policy should be linked to the organisational strategic plan, OHS policies, volunteer's policy, and other relevant policies such as consumer remuneration and reimbursement and confidentiality policies.

[[A template to write a consumer engagement policy is in Attachment 1.](#)]

Samples of consumer engagement policy are: [Health West. Community Participation Policy template](#) and [DHHS Tasmanian Draft CE policy](#).

A **consumer engagement framework** outlines the overall strategy the organisation has in place to implement its consumer engagement policy. It outlines the internal context, structures, personnel (staff), consumer engagement methods (including within the organisation and outreach and community initiatives) and resources dedicated to consumer engagement. It is a long-term document to be used in conjunction with the policy. Samples of consumer engagement frameworks are: [Health Consumer Queensland. CCE Framework](#) and [Yourcommunityhealth CCCP-Framework](#).

A **consumer engagement plan** describes the specific initiatives, activities, responsibilities, human and financial resources (budget) and timelines to implement consumer engagement across the organisation. This is a short-term document that can last one to three years. Consumer engagement initiatives take time and ideally the work plan should take into consideration the need to plan and develop relationships with consumers and communities the health service seeks to engage.

[[A template to write a consumer engagement plan is in attachment 2](#)]

A **consumer remuneration and reimbursement of consumers policy or guidelines** describes the way the organisation will offer remuneration or reimburse consumers for out-of-pocket expenses they may incur to be able to perform their representative or advisory role. Samples of remuneration guidelines and protocols are here: [Safer Care Victoria. Guide to consumer remuneration](#); [VCCC. Model CE and Remuneration schedule](#); [Consumer involvement Cancer Australia. Reimbursement protocol](#)

[[A consumer remuneration template and a payment records templates are in Attachment 3](#)]

Organisational self-assessment or readiness checklist

Organisational readiness is of utmost importance when recruiting consumers in governance and organisational committees. [A checklist to assess readiness of the organisation to implement consumer engagement is in Attachment 4.](#)

Recruitment tools/templates

A series of tools and templates to undertake recruitment of consumers are included in **Attachments 5 to 12**.

- [Consumer position advertisement template](#)
- [Position description](#)
- [Consumer representatives Expression of interest/Application form](#)
- [Interview questions](#)
- [Selection criteria](#)
- [Letters for successful](#)
- [Letter for unsuccessful candidates](#)

Support resources

A series of tools and templates to support consumers who have been recruited to governance or organisational committees are included in **Attachments 13 to 17**.

- [Consumer self-assessment tool](#)
- [Consumer self-assessment checklist](#)
- [Induction/orientation kit for consumers on committees](#)
- [Training, coaching and mentoring](#)
- [Other consumer support](#)

Attachment 1. Template to write a consumer engagement policy

Template to write a consumer engagement policy

Policy number:	Date adopted:	
Written by:		
Authorised by:		
Date last reviewed:	Reviewed by:	Date of next review:

Policy context: This policy relates to:	
National standards	[Insert national standards relevant to the policy]
Accreditation	[Insert accreditation requirements relevant to the policy]
Legislation or other requirements	[Insert legislation relevant to the policy]

Vision: Organisational vision for consumer engagement

Principles: Set of principles which will underpin consumer engagement across the organisation

Purpose/Rationale: Why do we have a participation policy?

Scope: This policy will apply to [indicate who the policy is for (consumers, carers, communities)] and definitions

Policy statement:

- Insert a general statement about the commitment your organisation has about consumer engagement
- Also insert a list of actions the organisation will undertake to implement this policy. These will be detailed further in your procedures.

Procedures

- Information strategies to ensure understanding of consumer engagement practice in your organisation
- Support to participate. List of strategies used to support consumer engagement in the organisation
- Strategies to involve consumers in service development and organisational governance and management
- Strategies to involve consumers in the planning and delivery of services

Other related policies and procedures

Documents related to this policy	
Related policies	
Forms or other organisational documents	

Review processes

Policy review frequency:	Responsibility for review:
Review process:	
Documentation and communication:	

SOURCE: Adapted from Queensland Council of Social Services. 2010. Participation policy template. Standards for Queensland Non-government Community Service Organisations (Standard 3)

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Attachment 2. Template to write a consumer engagement plan

Template to write a consumer engagement plan

Organisational commitment

- Purpose of the consumer engagement plan - should align with the consumer engagement policy and framework
- Values and principles that will guide the plan
- Staff/stakeholders you need to help define the purpose of the consumer engagement plan
- Your team, section and organisation's current consumer engagement understanding and practice
- Your team or section's position in terms of work, time availability and other competing needs
- Involvement of key others within the organisation, a staff champion and management

Consumer engagement plan

Objective(s)	
Priority or focus areas	
Consumer engagement tools, methods, activities or approach to use (e.g. consultations, advisory groups, workshops, etc.)	
Budget (for internal costs and remuneration or reimbursement of consumers)	
Timeframes	
Training/coaching/mentoring for staff and consumers	
Communication strategy (internal and external)	
Potential risks and risk assessment	
Evaluation	

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Attachment 3: Consumer remuneration template and consumer payment form

Consumer remuneration template

Consumer name:

Program and activity	Date	Amount	Code (office use only)

Consumer signature

Date:

Approved by:

Signature

Date:

Consumer payment form

Consumer Name

Consumer address

As arranged, we are pleased to provide a payment of \$ [insert amount] as a consumer payment for [insert purpose of payment].

Please complete the details below and return to [insert name and email address] via email, so we can process your payment for reimbursement.

I (name), agree to be compensated via the following method:

Bank Name:

Branch Code (BSB):

Account Name:

Account Number:

Signature:

Date:

Attachment 4. Organisational self-assessment tool

Organisational self-assessment tool

To undertake a self-assessment of your organizational readiness to implement consumer engagement, please answer the questions below.

Questions	Yes (✓)	No (X)	If yes, please describe	If no, what actions are planned or required	By when/Who's responsible?
Have you clearly identified who are your organisation's consumers?					
Has consumer engagement been incorporated into your vision or mission statement?					
Do you have policy on consumer engagement?					
Do you have reporting requirements about consumer engagement? To whom and how does your organisation report on its consumer engagement activities and outcomes?					
Do you have funding allocated to consumer engagement? Do you have an item for consumer engagement in your budget?					

Do you have a consumer remuneration or reimbursement policy?					
Do you have a staff position allocated to consumer engagement across the organisation?					
Are staff 'consumer champions' delegated with the task of promoting consumer engagement?					
Are consumer engagement principles reflected in staff position descriptions?					
Are these principles a part of staff's performance appraisal?					
Are consumers engaged in staff selection and appraisal processes?					
Are consumers engaged in staff induction and training?					
Do you offer consumer engagement education and training to Board, management, staff and clinicians?					
Do you have a framework for consumer engagement?					
Do you have a consumer engagement work plan?					

Do consumers participate in making key organisational decisions? (For example, are they represented on the Board of Management, Advisory Committees, technical committees, working parties, etc.?)					
Do you have systems in place to seek and act on consumer feedback? (For example, through consumer consultations, surveys and workshops.)					
Are there examples where your organisation has developed partnerships with community and consumer groups?					
Do you have processes for recognising the contribution of consumers? (For example, recognition in the annual report, inviting them to conferences, etc.)					
Do you have processes for consumers to find out about consumer engagement practices in your organisation?					
Do you have processes for all consumers engaged across the organisation to meet and exchange information and experiences?					

Do you provide an orientation program to support your consumers in consumer engagement activities?					
Do you provide education and training to consumers to support them in their engagement activities?					
Do you have a process to evaluate the effectiveness of your consumer engagement activities?					
Do you have a process to report internally on your consumer engagement activities and achievements?					
Do you have a process to report to consumers and the community your consumer engagement work and achievements?					

SOURCE: Cancer Australia. Organisational self-assessment survey for consumer engagement

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Attachment 5. Recruitment process

Recruitment process

The key to successful consumer recruitment is to establish a clear, simple process at the beginning. The process for recruiting consumers should be quite similar to recruiting staff. It's all about finding the right person for the job. Following best practice, aim to involve current consumer representatives as much as possible in recruitment and orientation of new consumers.

Safer Care Victoria has a checklist for recruitment consumers here [Safer Care Victoria. Checklist for consumer recruitment](#)

Position description (PD)

If the recruitment is for a consumer for an existing committee there are probably already Terms of Reference, and these can be used to develop a position description for the consumer role. A sample of consumer position is below and a resource to write terms of Reference is here [HIC Writing ToR for a committee](#)

Considerations

Think about recruiting two consumers for a committee or working group rather than one. This may help prevent feelings of isolation and powerlessness, allow them to offer each other support, ensure at least one is present if the other is sick, and allow for some succession planning.

Below are checklists, tools and templates to implement a consumer recruitment process:

- Consumer position advertisement template
- Position description
- Consumer representatives Expression of interest/Application form
- Interview questions
- Selection criteria
- Letters for successful
- Letters for unsuccessful candidates

Attachment 6. Consumer position advertisement template

Consumer position advertisement template

Health service	
Program/Project	
Committee	
Purpose of the committee	
Role of the consumer on this committee	
How many consumers are required?	
Skills, interests or experience the consumer should have	
Where meetings will take place	
Time commitment	
Commencement date	
Length of appointment	
Remuneration/reimbursement	
Supporting information	
How to apply	
Contact information	

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Attachment 7. Position description - SAMPLE

Position description – SAMPLE

POSITION TITLE	[Consumer/Carer/Community Representative/advisor]
REPORT TO	[Insert name and position of direct staff responsible for the committee management]
POSITION PURPOSE	[insert description from the committee’s Terms of Reference]
MEMBERSHIP TENURE	[Insert time of tenure – commencement and finish dates and if the position could be extended for another period. E.g. Fulfill a two year term with possible extension]
KEY RESPONSIBILITIES*	[List the key responsibilities. See below possible options regarding role descriptions. Key responsibilities should match the committee’s Terms of Reference]
SKILLS and EXPERIENCE*	[List the expected skills and experience of the candidate. See below some suggestions]
CONFIDENTIALITY AGREEMENT	[See template sample]
CONFLICT OF INTEREST	[See template sample]
REVIEW PERIOD	[Insert when the position description will be reviewed. E.g. every 2 years]

*KEY RESPONSIBILITIES

This is a list of possible key responsibilities. Not all have to apply. You may choose from the list the options that best address the committee’s Terms of Reference.

- Presents a broad consumer, carer or community perspective
- Provides a consumer perspective which is informed by feedback and the experiences and opinions of other consumers as well as their own experience and opinions
- Provides an important perspective to priority setting, discussions and decisions
- Has knowledge and understanding of the health system
- Has knowledge and understanding of health services governance structures
- Protects the interests of consumers
- Identifies and advocates for consumer perspectives in decision making
- Reports the activities of the committee to consumers according to confidentiality agreements
- Ensures that there is communication and dialogue between the committee and other consumers across the organisation
- Demonstrates ability to attend meetings and other meetings as negotiated
- Shows ability to work as a member of a committee of consumers
- Participates in self-assessment and review of committee proceedings as required

- Demonstrate commitment to safety and quality improvement in health services
 - Show commitment and ability to consult with a broader consumer constituency
 - Prepare and read materials and documents provided in preparation for meetings
 - Comply with agreed upon terms of reference, confidentiality and conflict of interests
- Provide a satisfactory police record check if required

***EXPERIENCE**

This is a list of possible experience required. Not all have to apply. You may choose from the list and/or add other experience that best address the needs of the committee.

- Must have had a healthcare experience within the last 10 years
- Must be users of the health service or care for someone who uses the health service or be an interested members of the community where the health service is located
- If affected by a health condition there must be two years since the initial diagnosis
- Have experience working collaboratively with other consumers, carers and community members, health practitioners, health system administrators and managers
- Has previous experience as a consumer representative/advisor in a health field

***SKILLS**

- Demonstrates consumer leadership skills
- Demonstrate ability to positively influence others and build consensus
- Demonstrates effective management of time and self-care
- Applies verbal communication skills
- Is able to present ideas and comments to the group
- Demonstrates an open mind on issues and awareness of own prejudices
- Applies negotiation and conflict management skills
- Has ability to problem-solve and resolve issues
- Brings energy and enthusiasm to the position
- Has ability to seek help or assistance when unsure or concerned about any issues

SOURCES: Department for Health and Ageing, Government of South Australia. 2012. Guideline Consumer and Community Advisory Committee / Group (CACAC / CAG) Policy Guideline and Toolkit; Institute for Patient- and Family Centered Care. 2019. Creating Patient and Family Advisory Councils; One Island Health system. Engagement tool. Health PEI.

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Attachment 8. Expression of interest/Application form

Expression of interest/Application form

Name:

Address:

Contact number:

Email address:

Communication preference:

Email

Telephone

Postal mail

Other

Do you require interpreter services?: Yes / No

I would like to be involved in the following consumer engagement activities:

- Receive information
- Participate as a consumer representative on committees
- Participate in focus groups on areas of interest
- Attend consumer open meetings or feedback forums
- Participate on consultations about policy issues
- Assist with consumer experience surveys and/or interviewing patients
- Reviewing written, audio, video or web-based information
- Other (please indicate what other activities you may be interested in participating)

My areas of interest in health services include:

My interest to participate is as:

- Consumer
- Carer or family member
- Community member
- Aboriginal and Torres Strait Islander
- Non English speaking background
- People with a disability
- Mental health lived experience

Other (please indicate what else you are interested in)

Why do you wish to register your interest in participating in consumer engagement?

Thank you for taking the time to express your interest in consumer and community engagement opportunities in [insert name of the health service]

Please forward this form, via email, with Expression of Interest in the subject line to: [insert contact details here]

SOURCE: : Department for Health and Ageing, Government of South Australia. 2012. Guideline Consumer and Community Advisory Committee / Group (CACAC / CAG) Policy Guideline and Toolkit

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Interview guide for consumer positions – SAMPLE

Below are some possible interview questions for when you are selecting consumers to be engaged as consumer representatives or advisors in your organisation. It would be unusual to use all of these – and probably somewhat intimidating. We recommend choosing several from the list and using as is or adapting to meet your particular position requirements.

General questions

- What appeals to you about this position or committee?
- What is your understanding of the role?
- How do you think you can best contribute to our work?
- How might your personal consumer experience be relevant or useful?
- Have you (or a family member or a friend) had an experience of health care in the last five years?
- Have you been diagnosed with a health condition in the last two years?
- Have you been involved as a consumer representative or advisor and with which organisation (s)?
- How confident are you in representing the needs of others as well as your own?
- Are you engaged in a consumer advocacy organisation or a community group?
- What are your areas of interests?
- Are there areas that you wish to develop skills in?
- Do you anticipate particular challenges or frustrations with this work?
- How would you like to receive information/communicate with the health service?
- What communications and computer technology is available to you? i.e. do you have access to a phone and the internet?
- Is there any other information that you think might be important for us to know about you?

Competency based questions

Communication

A part of this role involves discussing and evaluating options or ideas in a limited timeframe. Can you discuss a time when have you had to present an idea to a group of people for their feedback? How did you do it? What was their response?

What to look for: Actively listens, checks understanding, expresses ideas clearly, uses appropriate language.

Teamwork

What sort of teams or committees have you been involved in? What was your role?

What to look for: Encourages a supportive environment, encourages free exchange of ideas, encourages feedback.

Innovation and initiative

We are always looking for better processes or ways of doing things. When have you identified a new, unusual or different approach to solving a problem or facing a task?

What to look for: Generates solutions, uses novel approaches, suggests ideas for improvements.

SOURCES: Health Issues Centre. 2014. Interview guide for consumer positions; Alberta Health Services Engagement and Patient Experience Department. 2014. A Resource Toolkit for Engaging Patient and Families at the Planning Table

A guide to consumer selection interview is available here [Consumer involvement. Cancer Australia. Guide consumer selection interview](#)

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Consumer recruitment - Selection Criteria

Examples of possible selection criteria are:

- Experience as a consumer or carer in relation to the issue / subject matter.
- Previous involvement with consumer groups / organisations.
- Demonstrate real, or understanding of, potential conflicts of interest.
- Ability to report back to consumer group / organisation.
- Ability to effectively communicate on behalf of consumers.
- An awareness of the needs of groups of consumers and not just the individual.
- Be reliable and responsible and willing to commit time to attending scheduled meetings.
- Ability to represent other's views with objectivity.
- Demonstrate an understanding of the issues involved.

Attributes, skills and knowledge for consumer representatives.

Attributes:

- Interest in improving the health system
- Willingness to commit time to health issues
- Ability to relate to their own experience of health care to broader consumer issues
- Ability to represent and respect the views of other people who use the health care system
-

Skills and knowledge:

- Knowledge of the health care system
- Communication skills
- Experience with working on a committee or representing other people
- Empathy
- Personal level of empowerment

SOURCE: : Department for Health and Ageing, Government of South Australia. 2012. Guideline Consumer and Community Advisory Committee / Group (CACAC / CAG) Policy Guideline and Toolkit

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Attachment 11. Letter for successful candidates – Sample

Letter for successful candidates - Sample

Date

Applicant's name

Street address

Suburb, state, postcode

Dear [Applicant's name]

Thank you for your application for the position of [insert position].

I would like to personally congratulate you on your great interview on the [insert date]. I would at this time like to offer you the position of [insert position].

We look forward to you joining our team. Please notify [insert name and contact details] of your intention to accept this offer.

Should you accept the position, as conveyed during the interview process, you will be required to complete an induction meeting. Additionally, we will at this time commence our engagement verification process by asking you to obtain a police check [if required].

Thank you for your interest in joining us at [insert name of health service] and for taking the time to submit an Expression of Interest and attend the interview.

Yours sincerely

Name of health service representative

Title

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Attachment 12. Letter for unsuccessful candidates - Sample

Letter for unsuccessful candidates

Date

Applicant's name

Street address

Suburb, state, postcode

Dear [Applicant's name]

Thank you for your application for the position of [insert position].

We have received many applications from well-qualified and experienced candidates.

Unfortunately, on this occasion your application for the [insert position] was unsuccessful.

Nevertheless, we at [insert name of health service] offer many other opportunities to engage with consumers and you may be interested in joining us in another capacity.

If you are interested in joining us in other of our consumer engagement initiatives, please contact [insert name, position, and contact details].

We wish you well in your future endeavours and encourage you to get in touch with us and apply again in future if a suitable position becomes available.

Yours sincerely

Name of health service representative

Title

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Attachment 13. Induction/orientation kit for consumers on health service committees - Sample

Induction/orientation kit for consumers on health service committees - Sample

Introduction

Welcome to *(insert name)* Committee. We are delighted you have decided to help us improve the services within *(name of health service)* and look forward to your contribution.

There is evidence that active consumer participation in health service planning improves the quality of health care and the effectiveness of health systems. Your role as a consumer representative or advisor is important to us and will assist us to meet the needs of the communities we serve.

We will do our best to assist you in your role as a consumer representative or advisor on a committee and to support you in any way we can.

About *(insert name of health service)*

[Insert information about your health service] e.g. The vision and goals of the organization; consumer engagement policy, framework and plans; site map; Organisational chart, etc.

Definitions

Consumer

“Consumers include people, families, carers and communities who are current or potential users of health services. This includes children, women and men, people living with a disability, patients, carers, clients, people of diverse cultural, linguistic and religious experiences, socioeconomic status and social circumstances, sexual orientations, sexes, genders and gender identities, health and illness conditions. The term also includes people who choose to get involved in decision-making; health consumer representatives who provide advice on behalf of consumers, with the overall aim of improving healthcare; and carers who often have an important role in health care decision making and care giving. Different health settings use terms such as: patients, people/persons, families, carers, clients and residents”.¹

Consumer engagement

“Consumer engagement reflects an approach involving the development of meaningful relationships with a shared focus. Consumer engagement is underpinned by trust and mutual respect, a commitment by all involved and active two-way dialogue. The term consumer engagement indicates that action is more than simply taking part.”²

Consumer representative

¹ Horvat, L 2019. Partnering in healthcare for better care and outcomes, Safer Care Victoria, State Government of Victoria, Melbourne. P. 38

² Monash Partners. 2020. Consumer and Community Involvement

“A health consumer representative is a health consumer who has taken up a specific role to provide advice on behalf of consumers, with the overall aim of improving healthcare. A consumer representative is often a consumer member of a committee, project or event, who voices consumer perspectives and takes part in decision-making on behalf of consumers. A health consumer representative may be nominated by, and accountable to, a consumer organisation. Usually the person works with a health service or consumer organisation, but they may also operate independently in some activities”.³

[Insert other definitions as required]

Reporting

[Insert information about whom the committee reports to and is supported by]

Your role as a consumer on a committee

The role of the (insert name of committee) is outlined in the Terms of Reference. A copy of this document is attached.

Your role as a consumer member of this committee is to ensure that the perspective of our consumers is included in all the committee’s discussions, decisions and recommendations.

It is important that we are always conscious of the impact our decisions will have on the people who are using our health service.

Being on a committee is about working in collaboration with the health services. As a member of the committee you need to think not just about your views and issues but about the broader community and the collective impact on all consumers.

Support for consumers on committees

Your support person/people for the *(insert name of committee)* is *(insert name and contact details)*. He/she should be your first point of contact for any questions, feedback or other issues.

The Chair of committee has the responsibility to help all members of the committee to participate in decision-making. The Chair plays a significant role in the business of the committee including keeping track of decisions made, action taken and ensuring that all members are treated fairly and respectfully. The Chair will introduce you to other members of the committee when you commence your role.

The Secretary of the committee oversees sending out the papers and making sure items are put on to the agenda. The Secretary will usually send out the agenda prior to the meeting.

Participation in meetings

Before the meeting

Read the agenda and minutes of the last meeting. It might be worth meeting with your contact person on the committee prior to the meeting, to ask any questions about anything that is new to you or you don’t understand.

³ Horvat, L 2019. Partnering in healthcare for better care and outcomes, Safer Care Victoria, State Government of Victoria, Melbourne. P. 38

If there is any jargon or medical terminology that you do not understand, ask for an explanation. Make some notes about any points or questions you would like to raise.

At the meeting

Feel free to ask questions about anything you don't understand. You can also join in the discussion and make comments.

Clarify if you can add items to the agenda, whether this be at the beginning or end of the meeting. If items are dropped, use 'other business' to have them put on the agenda for the next meeting.

After the meeting

If you had any difficulties with the meeting, make a time to discuss them with your support person on the committee as soon as possible.

Frequently asked questions

How do I make sure I am clear about my role and expectations?

The Terms of Reference has been provided to you. If you have any questions about your role, your support person will be available to discuss this with you.

What training and support will I receive as a consumer to support me in my role?

[Insert your information here] e.g. training; mentoring and coaching; meeting with other consumers; briefing and debriefing before and after meetings, etc.

What are my entitlements as a consumer committee member?

[Insert your information here] e.g. reimbursement for out-of-pocket expenses; remuneration; participation in conferences and workshops, etc.

Who do I talk to if I am having difficulties in my role?

If you are having any difficulties please talk to someone who you feel comfortable discussing it with. This could be your support person on the committee, another member of committee or the Chairperson. Do not be afraid to voice your concerns. We want to ensure that you have every opportunity to fulfil your role.

Resources

Websites

Websites that you may find useful in your role as a consumer committee member:

Health Issues Centre

www.healthissuescentre.org.au

Safer Care Victoria – Partnering with consumers

<https://www.bettersafecare.vic.gov.au/support-and-training/partnering-with-consumers>

Australian Commission on Safety and Quality in Healthcare – Partnering with consumers

<https://www.safetyandquality.gov.au/standards/nsqhs-standards/partnering-consumers-standard>

Consumer Health Forum of Australia – Guidelines for consumer representatives

<https://chf.org.au/guidelines-consumer-representatives>

Health Consumers Queensland – A Guide for Consumers Partnering with Health Organisations

https://www.hcq.org.au/wp-content/uploads/2018/06/HCQ_ConsumerGuide.pdf

Attachments

(Information from your health service)

- Terms of Reference
- Consumer position description
- Confidentiality and conflict of interest statements
- Reimbursement and/or payment information

SOURCE: Health Issues centre. 2014. Induction kit for consumers on health service committees.

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Attachment 14. Consumer self-assessment tool

Consumer self-assessment tool

This self-assessment tool may help you in determining your goals and readiness for the consumer representation role you have recently decided to undertake.

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

Why do I want 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 can 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?	
How do I think the organisation will benefit through consumer involvement?	

Developed by Health Issues Centre for Cancer Australia, November 2013

Attachment 15. Consumer self-assessment checklist

Consumer self-assessment checklist

This is a self-assessment checklist. You don't need to provide it to anyone, but you could share it with others if you chose to do so. Some of the questions relate to your capabilities and some relate to the responsibilities of the organisation you're engaged with. You may find it useful to try to work through this brief checklist as you prepare for a review of your role as consumer representative or advisor.

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

1. Consumer experience

Questions	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:			

2. Consumer motivation

Questions	Yes	No	Unsure
Do you feel that your experience and knowledge is appropriate for the role you're taking 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 comment's section			
Comments:			

3. Consumer capability to meet the environment

Questions	Yes	No	Unsure
Do you feel that you have an understanding of 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:			

4. Consumer understanding of context

Questions	Yes	No	Unsure
Do you have an understanding of the way the organisation you are working with fits in the broader health context?			
Have you been provided with information about other types of consumer engagement in the organisation?			
Comments:			

5. Learning and development

Questions	Yes	No	Unsure
Has the health service you are involved with provide you with professional development opportunities?			
Are there specific knowledge areas where 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 thought in the space below]			
Have you been offered opportunities to write or speak about consumer involvement or participate in conferences?			

Comments:			
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6. Consumer support networks

Questions	Yes	No	Unsure
Have you been offered assistance/reimbursement for any related expenses?			
Are you in contact with consumer networks and organisations outside the organisation 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:			

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 Revised, August 2020

Attachment 16. Training, coaching and mentoring

To support consumers engaged in the organisation, you may develop a training program for consumers using a Consumer Needs Training Assessment tool as the one presented below. After establishing the training needs of consumers you could decide to offer the training internally or seek external training services. And you may consider coaching and mentoring programs to complement the training programs.

[\[Insert link to HIC's Consumer mentorship program Manual and Guide\]](#)

Consumer training needs assessment A quick guide for health services

Introduction

In preparation to conducting the consumer training needs assessment, it would be useful to scope the context in which the training will take place. Questions to consider when undertaking a training needs assessment may include:

- What training is already being offered to consumers?
- Does the organisation have knowledge and expertise to train consumers in-house or will an external trainer be needed?
- Will training be offered to several consumers in-house or will individual consumers be offered off-site training?
- Can the training be conducted online?
- Do you have a budget for training consumers?
- Who will be the participants in the training?
- Are all participants at one location or multiple locations?
- Is training the best option? Could other alternatives be better used such as mentoring, coaching or counselling.

Conducting a training needs assessment

It is important to engage with the consumers who will participate in training when undertaking the training needs assessment. To conduct a consumer training needs assessment you may use several methods, including:

- Information about the consumers held in the Consumer Register (if you have one)
- Individual interviews
- Focus groups
- Surveys, questionnaires and self-assessments
- Observations

Developing a training needs assessment

To develop the training needs assessment, you can use a proficiency scale like the one described below. Discuss these proficiency levels with the consumers. This will help you and the consumers to choose the training topics that will benefit the consumers according to their proficiency level.

Proficiency levels

Introductory level

You have a common knowledge or an understanding of basic techniques and concepts 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 this skill.

Intermediate level

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.

Advanced level

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.

SOURCE: National Institutes of Health. Office of Human Resources. Proficiency Scale

Training needs assessment resources

Below are two resources or tools that may help you and the consumers to conduct a training needs assessment.

Table 1: Training Needs Assessment for Consumers. This table may help you to assess the training needs of consumers according to a proficiency scale and to see what types of training is available for consumers.

Table 2: Training available for consumers. This table has a description of some of the training topics that are available to consumers. You can use this information to design the training program most suitable to consumers' needs.

Prepared by Health Issues Centre
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Table 1. Training needs assessment for consumers

The table below will help you and the consumers assess their competency using a proficiency scale of three levels: introductory, intermediate or advanced. In the tables below there are lists of topics grouped by levels of competency. To be able to select which training is needed by the consumers, identify which level of knowledge (competency) your consumers have in relation to consumer engagement: introductory, intermediate or advance. Then, you can select the training topics that will be useful to consumers.

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

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

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"> ▪ Focus is strategic ▪ You have demonstrated consistent excellence in applying this competency across multiple projects and/or organizations ▪ You are considered the “go to” person in this area within and/or outside organizations ▪ You create new applications for and/or lead the development of reference and resource materials for this competency ▪ 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.
Training topics	
<ul style="list-style-type: none"> ▪ Consumer engagement in the implementation of national quality and safety standards ▪ Peer support and how to establish and manage a peer support group ▪ Social media and advocacy ▪ Engaging with diverse and seldom heard communities ▪ Health information and health literacy ▪ Assessing written and online health information ▪ The human rights-based approach to health care ▪ Co-production ▪ Advanced governance: corporate and clinical governance ▪ Clinical governance ▪ Patient-centred care ▪ Consumer engagement in research 	

Table 2. Training available for consumers

Below is a list of training topics that are available to consumers. You could use this list to discuss training needs with the consumers and design a program that will address their training needs.

✓	Topics
	<p>Getting involved</p> <p>This session will focus on the reasons people get involved with health organisations, government bodies or services and some basic ways consumers can contribute to improving the health of the community.</p>
	<p>Definitions, rationale, evidence and policy context</p> <p>The session aims to provide a broad overview of consumer engagement definitions and rationale, state and national policies and international evidence.</p>
	<p>Pillar of engagement</p> <p>This session will include a brief introduction to the main pillars of consumer engagement including: the human-rights-based approach to health, social inclusion and community development. Each topic could be revisited in more detail overtime.</p>
	<p>Health literacy</p> <p>Health literacy is more than understanding written information and consumers reviewing brochures. As consumer representatives it is important to understand the principles of health literacy. This workshop will equip participants to contribute to the creation of health literate organisations and enhance the health literacy of their communities.</p>
	<p>Co-design and co-production</p> <p>To work effectively in collaboration with health services, consumers need the necessary skills and knowledge about co-design and co-production. This workshop looks at the literature and best practice examples for implementation of co-design projects.</p>
	<p>Clinical governance</p> <p>In light of the Duckett review - <i>Targeting Zero: the review of hospital safety and quality assurance in Victoria</i> - there is a growing expectation that consumers will be involved as members of Boards and clinical governance committees. This session explores the “world of clinical governance” and the definitions, frameworks and best practice to becoming an effective consumer representative or a Board member in a clinical governance committee.</p>
	<p>A basic introduction to the Australian health care system</p> <p>This session will include an overview of the structure and function of the Australian health care system and will include specific information on health care funding and service delivery, as well as the roles of governments and public and private sector providers.</p>
	<p>Committee work: How to be effective</p> <p>This workshop will provide advice and strategies to maximise your involvement on the Council. It will include steps for chairing committees, the role and importance of committee meetings, minutes, communications skills (verbal and written), working together, setting group goals, problem solving and understanding group dynamics.</p>

	<p>Influencing decision making</p> <p>The session will include strategies to influence change, discussions about how to influence decision making within the Council but also outside the Council; how to negotiate using a “win-win” approach, achieve consensus avoiding conflict, and how to influence shared decision making processes.</p>
	<p>Support for consumers on committees – looking after yourself</p> <p>The workshop will include information on planning for your role, steps for managing time and commitments, advice on setting boundaries, gaining support for an issue and looking after yourself in your consumer participation role.</p>
	<p>Raising awareness and advocacy</p> <p>This session will include:</p> <ul style="list-style-type: none"> • strategies for advocating to decision-makers • steps for designing campaigns and creating support for an issue • different approaches to advocacy • storytelling • ideas for mobilizing communities.
	<p>Improving the quality and safety of health services</p> <p>This session will present information on areas of quality and safety in health organisations and services and avenues for consumers, carers and community members to become involved. Strategies for utilising feedback from consumers and how to consult with the community will be included.</p>
	<p>Helping health services, organisation and government bodies get to know and form partnerships with its community</p> <p>The session will include advice on conducting community research and working with community researchers, inform and advocate to communities more broadly and specifically to consumer peak bodies.</p>
	<p>Representation and diversity in the community</p> <p>This session will explore the issues of representation and diversity in the community. Strategies to identify diversity in the community and how to identify key stakeholders to work with to improve access and equity.</p>

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Attachment 17. Other support for consumers on committees

Organisations can also support consumers by offering:

- Provide administrative and secretarial assistance. E.g. taking minutes, writing action plans for the committee, conduct evaluations, report to other relevant sections of the organisation, etc.
- Provider reimbursement for use of phone, internet connections, paper, printers, etc.
- Organise meeting between consumers
- Facilitate meetings with committee chairs or key staff
- Profile their details and contributions in intranet, newsletters and web site
- Invite and support consumers to attend conferences, workshops, etc.
- Facilitate networks of consumers in a region or catchments