



Consumer Engagement Train the Trainer (TTT) Toolkit

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Registered Office
805/220 Collins Street,
Melbourne,
VIC 3000

Postal Address
PO Box 7068,
Wattle Park,
VIC 3128

(03) 8676 9050
www.hic.org.au
info@hic.org.au
ACN: 632 645 811

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Introduction

This **Consumer Engagement Train the Trainer Toolkit** was developed by Health Issues Centre with funding from Safer Care Victoria to support the staff of health services who are training others in the organisation to plan, implement and evaluate consumer engagement in governance and organisational committees.

This Toolkit is designed to be used in conjunction with the **Consumer Engagement 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.

This Toolkit can also be complemented by the Health Issues Centre's **Guide to engaging diverse consumers in organisational and governance structures**.

How to use this Toolkit

You have used the **Consumer Engagement Train the Trainer Manual** to learn how to develop a train the training program and train others in the health service. Now that you have the generic program ready, you will be embarking on the training and support of others in a specific content.

This time it is about how to plan, implement and evaluate consumer engagement in governance and organisational committees in your organisation. To be able to implement best practice consumer engagement you – and your trainees - need to have strong foundations such as **consumer engagement policies, frameworks and plans**. This will ensure that you are implementing sound consumer engagement that rely on leadership commitment and the necessary structures to support consumers in governance and avoid tokenism. An **organisational self-assessment or readiness checklist** will help you assess the readiness of the organisation to plan and implement consumer engagement in governance and organisational committees in your organisation.

Once you have ensured that the relevant policies and frameworks are in place and you have assessed the readiness of the organisation to implement consumer engagement, you may start the process of **planning** consumer engagement. At the same time as you start planning for consumer engagement, you should start thinking about the **evaluation** of the process and outcomes of engaging consumers; this will help you to plan a sound process that will result in best practice consumer engagement.

A series of consumer engagement **tools and templates** and consumer engagement **support resources** are available in this Toolkit to help you and your trainees to implement best practice consumer engagement in organisational committees and governance.

Consumer engagement policies, frameworks and plans

Engaging consumers in 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 consumer engagement is supported by 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.]

An example of a consumer engagement policy is: [Early Start Australia Consumer Engagement 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](#); [WCHN-Consumer Engagement Strategy and Framework](#); and [The Patient Will See You Now Tasmanian Consumer Engagement Model](#).

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 template are in Attachment 3]

Organisational self-assessment or readiness checklist

Organisational readiness is of utmost importance when establishing best practice consumer engagement in governance and organisational committees. **A checklist to assess readiness of the organisation to implement consumer engagement is in Attachment 4.**

Purpose

When undertaking consumer engagement, it is essential to be clear what the engagement aims to achieve. The purpose of the engagement process should be explicit and clear to the consumers and organisational staff engaging with them. Ideally, the purpose should be agreed from the beginning by those that will be invited to engage and the organisation. Establishing relationships with consumer organisations, peak bodies, and community groups early in the planning process will facilitate buy-in and full participation of consumers engaged in these organisations.

Challenges and how to address them

Each consumer engagement initiative will take place within an internal organisational context. The internal context will present challenges and constraints but also opportunities for the engagement process to be successful. It is important to identify the potential internal issues that may affect the engagement. The organisation should be able to demonstrate leadership support and commitment to consumer engagement¹; a clear understanding about the past experience of the organisation and of the staff that will engage with the consumers; their perception of risk related to engaging consumers²; how potential barriers and challenges will be managed; how meaningful engagement will be ensured; and how well the organisation and staff understand the consumer role.³

Suggestions to respond to organisational barriers and challenges⁴.

- **No time, budget or resources:** A considered, and planned investment of time, resources and budget allocation will result in savings and improvements far greater than the investment. Making sure that consumer engagement is an ongoing item in the organisational budget, will ensure that human and financial resources are available when engaging with consumers.
- **Attitudes toward partnering with consumers:** The vision and values of the organisation can be used to advocate for partnering with consumers. The goal is to build a culture that promotes consumer engagement as everyone's responsibility and part of everyday processes.
- **Lack of skilled consumers:** Staff can play an important role in developing and supporting consumers, so they gain confidence and experience. Every consumer considered 'experienced' started with no experience. Seek expert advice, training and coaching according to consumers' needs.
- **Not sure how to access the right consumer:** There is no such thing as the 'right' consumer. There are usually a number of consumers who would be a valuable 'fit' for what the organisation is looking to achieve. It is important to establish mechanisms to ensure a range of active consumer voices across the organisation and not rely on a few individuals to speak for the community. For example, establish relationships with consumer organisations and peak bodies that represent consumers.

¹ Health Consumers Queensland. A Guide for Health Staff Partnering with Consumers. Brisbane. p.13

² Institute for Patient and Family-Centered Care. 2010. A checklist for attitudes about patients and families as advisors. https://www.ipfcc.org/resources/Checklist_for_Attitudes.pdf

³ Alberta Health Services Engagement and Patient Experience Department. 2014. A Resource Toolkit for Engaging Patient and Families at the Planning Table.

⁴ ADATED by HIC from: Health Consumers Queensland. 2018. A Guide for Health Staff: Partnering with Consumers Brisbane. p.14

- **Training and support:** Identify organisation's consumer engagement policies and procedures and the organisation's consumer and community engagement strategy. This will help clarify what the organisation has committed to doing or is doing. Arrange training for staff and consumers as needed.
- **Lack of leadership buy-in:** Consumer engagement needs to be supported and championed by organisational leadership including boards, executive and middle management. Staff can be leaders by asking how consumers will be involved from the beginning, and in an ongoing way in the development and production of any new policy, service or program.

Consumer engagement should not be undertaken with the purpose of responding to external requirements such as meeting accreditation standards or funding requirements. Tokenism must be avoided at all costs. Consumer engagement should respond to a thought-through and trustworthy process by which the organisation seeks to gain the consumer perspective in decision and policy making processes. It is important to ensure that the contributions made by consumers engaged in governance and organisational committees are acknowledged and taken into consideration.

Factors affecting effective consumer engagement

Consumer engagement in policy and decision-making and organisational governance is demanding and several factors must be taken into consideration for it to be effective. For example, engagement on committees and other formal structures such as executive teams, committees and working parties, may be challenging to consumers that may not be familiar with meeting-driven organisational processes. Some of the issues include: meetings are conducted at a pace that may be challenging for some consumers; some consumers have said that there is not enough thinking time or that communication in meetings is too fast; there is too much reliance on computer-based communication and not enough thought given to other forms of communicating; there is also the issue of the content of communication, for example, the extent to which different parties have different perspectives or are on different wavelengths.

Other factors affecting effective engagement in structured settings are: lack of clarity about the role of the consumers on the committee and how much power and influence the consumers have in decision-making processes; difficult group dynamics and relationships - for example one or two dominating persons; documents that are too long, complicated and not in plain language; poor acoustic environments for communication, for example too much background noise; lack of accessible transport and finance for it; lack of interpreters.⁵

Planning consumer engagement

The design of the consumer engagement process should follow closely the purpose of the engagement and the understanding of the internal context where the engagement will take place. The process of engagement is based on the purpose - this is, deciding what is to be achieved - and which methods should be used. The process of engagement will be strengthened if the organisation has the human and financial resources to support the engagement process. For example, having allocated staff time to support the internal process to engage with consumers and to support the

⁵ INSIGHTS. 2011. Effectively engaging and involving seldom heard groups. Institute for Research and Innovation in Social Services (IRISS). Scotland.

consumers engaged; having an item for consumer engagement in the budget; and a policy regarding reimbursement and remuneration of consumers engaged.⁶

The process on engagement with consumers will be strengthened if the organisation makes it clear to consumers that they are invited to engage in internal organisational decision-making processes and governance. These settings may present certain constraints and necessary confidentiality requirements which should be clear to the consumers from the beginning. Clear expectations and roles, Terms of Reference (ToR) or “rules of engagement” and confidentiality statements should also be made clear from the beginning. Templates for ToR and confidentiality statements are found in **Attachment 5** and **Attachment 6**.

Support for consumers should be in place to ensure that the engagement is meaningful and that consumers are acknowledged and informed of the results or impacts of their engagement; support for consumers engaged across the organisation to meet and share experiences should also be made available. For example, acknowledging consumer contributions in Annual Reports; inviting consumers as co-presenters at conferences; inviting consumers to present their contributions to the board; thanking consumers for their contribution via intranet, on websites and staff meetings; etc.

Consumer self-assessment and organisational assessments tools must be used on an ongoing basis to ascertain the effectiveness of the consumer engagement processes. Necessary amendments and changes are undertaken to address any difficulties or barriers to meaningful engagement.

Consumer self-assessments tools are available in the Health Issues Centres’ **Guide to assessing quality of engagement**

Implementing consumer engagement

Tools and templates

A series of tools and templates to implement consumer engagement are included in **Attachments 7 to 14**.

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

⁶ Templates and tools to budget for consumer engagement costs, and reimbursement guidance are available. For example, VCCC.2021. [Consumer Engagement Toolkit](#); Safer Care Victoria. [no date]. [A guide to consumer remuneration](#).

Consumer engagement resources

A series of tools and templates to support consumers who have been recruited to governance or organisational committees are included in **Attachments 15 to 17**.

- Induction/orientation kit for consumers on committees
- Training, coaching and mentoring
- Other consumer support

Evaluating consumer engagement

Undertaking mentoring and evaluation of consumer engagement is best practice and should be done on ongoing basis. In **Attachment 18** there is a tool that will help you plan the evaluation for your project – even before you start. The tool helps you to answer the question: *How do we know that a consumer engagement project has made a difference to what we do?*

A practical way to evaluate a project is to summarise the project by answering a series of questions. You can use answer these questions below to summarise the consumer engagement project you want to evaluate. This summary may also be useful to communicate to internal and external stakeholders and the community the project and outcomes of the project.

1. Describe what made the project successful.
2. Why was the project important to your community?
3. Why was it important to engage your community in this project?
4. Describe how you engaged the community
5. What tools and approaches did you apply to seek contributions from the community?
6. Describe the results
7. How did your community influence project outcomes?
8. What challenges were faced and how were they overcome?

If you want to evaluate a **process** of engaging consumers as consumer representatives or advisors in an organisational committee, you may consider using questions that will address the following:

- Clear articulation of roles and responsibilities (Position description)
- Clearly defined task(s) (Terms of Reference for the consumer on the committee)
- Consumers and staff satisfaction with process
- Early involvement
- Transparency of decision making process
- Representativeness
- Timeliness, participation rate and costs
- Orientation or induction
- Briefing and debriefing before and after meetings
- Remuneration or reimbursement for out-of-pocket expenses
- Training or mentoring

Sample questions

- Was the decision and rationale to engage consumers communicated to the staff and consumers engaged?
- How many consumers participated in the engagement activity?
- Were diverse consumers engaged including seldom heard groups?
- Was there support for consumers provided? If so, what support was provided?
- Was staff time within estimates?
- Were costs within budget?

If you want to evaluate the **outcomes** of engaging consumers as consumer representatives or advisors in an organisational committee, you may consider using questions that will address the following:

- Engagement goal and expectations met
- Influence/contribution of consumers on decisions
- Consumer experience of being heard and understood
- Effect on staff attitude towards patient engagement
- Staff satisfaction with overall consumer engagement process
- Consumer satisfaction with overall engagement experience

Sample questions

- Were the organisational consumer engagement goal and expectations met?
- Did the consumer engagement activity contribute to the
 - health service quality improvement
 - committee's Terms of Reference
 - aim/objective of a project
- Was input from the consumers included in the decision-making process? How?
- What would you do differently next time?

See more evaluation tools in **Attachment 19** (Evaluation methodologies) and **Attachment 20** Evaluation questions.

A **Community Advisory Committee (CAC) Evaluation Framework** is available in the Health Issues Centre's website. This Framework will help you to evaluate the effectiveness of your CAC.

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	
Accreditation	
Legislation or other requirements	

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	

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. Writing Terms of Reference for a committee

Terms of Reference (ToR) are important for any committee. Below is a suggested list of things you might want to include. Use this as a guide only, as ToR are best tailored to the particular group and written with their full participation. The less jargon and legalistic terms you use, the more useful you will find your ToR. It should be a tool to help you achieve, not an obstacle.

Mission statement or Vision

This is normally a short statement, preferably one or two sentences, stating what you hope to achieve, and your 'big picture' idea. For example, Starbucks' Mission Statement is: *'our mission: is to inspire and nurture the human spirit – one person, one cup and one neighbourhood at a time.'* This really has nothing to do with making coffee – that comes later. What do you hope to achieve, broadly, as a group?

Purpose

This is a statement of the things the group can do. If there are policies, procedures or legislation that affect the group, mention them (briefly) here. If there is anything obvious that's outside the group's scope, mention it here. For example: 'The advisory group does not respond to individual patient and family complaints.'

Activities/specific issues to be addressed

In preparing this list (dot points are good), clarity is essential to provide focus and direction for the group. Be specific and realistic. This can be updated periodically as the scope or nature of the work progresses, so don't worry about trying to include everything.

Terms of membership

The terms of membership could also include the number of members, skills and experience required or preferred. For example, the group may decide that a specified number of members need to be users or former users of the health service.

You will want guidelines regarding timeframes for membership. For example, what is the term-length for members? Is there a limit to the number of years a person can be a member? Can long-term members be rolled over into a 'consumer emeritus' status which would allow them to be brought in for advice or to provide peer support without continuing as a member?

Resignation and dismissal of members

Normally a member of the consumer advisory group may resign at any time. It is helpful to incorporate into the Terms of Reference a system for eliciting feedback from a resigning member through an exit interview. This feedback is essential for understanding sources of dissatisfaction or disenchantment among members.

The organisation, or the advisory group itself, may choose to remove a person from the consumer advisory group if they decide it is not in the interests of the organisation (or the group) for the person to remain a member. This is obviously a decision which should not be taken lightly and should be done in conjunction with the consumer leaders among the group. If the organisation or

group intends to make such a decision, they must give the member written notice setting out the intended decision and the grounds on which it is based.

There may be a number of possible reasons for dismissal of a member which you may wish to spell out. Some examples:

- the person is not working at the required standards (and is unable or unwilling to do so)
- they have contradicted the aims of the group
- the person has lost the trust and confidence of the other members

The organisation may also choose to add a clause which allows them to remove a person from the consumer advisory group if, without reasonable excuse, that person fails to attend a specified number of consecutive meetings.

Timeframes

- Expected duration of the group: Is it permanent? Or will it last only through a particular project?
- Are there any significant or obvious milestones along the way? Does the completion of these affect the membership of the group? For example, completion of one stage of a large project may mean it's necessary for members to change roles or there may be a need to recruit new members with a different set of skills or experience.
- Are the timeframes set in concrete or are they negotiable? If negotiable, under what circumstances?

Meetings

- Schedule and duration of meetings (e.g., monthly for 1.5 hours)
- Process for setting up periodic meetings and if meetings may be required other than those listed above
- Process to select a Chair and/or if Chair is to be rotating. This might include whether or not the Chair must be a consumer, the option of co-Chairs, etc.
- Position description for Chair. Will this role include administrative duties or will the organisation manage those?
- Who will determine the content of agendas? This is a very important issue as it will inevitably shape the focus and direction of the group.
- How will the minutes be recorded and distributed? Who is responsible for this?

Resources and training for members

- Reimbursement of out-of-pocket expenses will need to be covered in the Terms of Reference. For example, will members receive a sitting fee? Will other support for attendance be provided, such as travel costs, accommodation, parking, child care, carer respite, etc.?
- What resources are available to the group and how they will be accessed? For example, secretariat and clerical, computer access, word processing, telephone, photocopying, catering for meetings, etc.
- Is there an orientation program for group members? If so, what is included in that program or information packet?
- Will there be any training provided for group members? This might include sessions on committee protocol or storytelling.

Reporting guidelines

Develop and include in the ToR a reporting structure, no matter how simple, for the group. Who will they report to, how and how often? Who will write or present these reports? This is essential not just for practical purposes, but because developing good reporting systems will help to increase the group's influence and ability to shape organisational policy.

Grievance procedure

Consumer members have the right to make a complaint in relation to the activities and operation of the group. The organisation may want to put in writing its commitment to resolving complaints fairly, reasonably and promptly. A complaint may be made in person or in writing. The first point of call should be the Chair of the group, then the person responsible for the group within the organisation (a member of the staff) and then the CEO of the organisation, before engaging in a formal grievance procedure.

The formal grievance procedure should follow standard procedures that the organisation has in place for management of complaints for staff and board members.

Review of the Terms of Reference

Establish the timelines for reviewing the ToR and the process to be undertaken. How often will they be reviewed and who will conduct the review? Ongoing groups may choose to allocate a time during a specific meeting every year for this process to occur.

Additional items

Some organisations have specific policies around confidentiality and/or a Code of Conduct for committee members and staff. You may need to cite these within the Terms of Reference.

Source. Health Issues Centre. 2014. Writing Terms of Reference for a committee.

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Attachment 6. Consumer Confidentiality and Conflict of Interest Statements - SAMPLE

Confidentiality and Conflict of Interest statement for (insert title of the committee and organisation)

This agreement is made between [insert name of the organisation] and [insert full name], member of the (insert name of the committee).

I understand that:

Confidential Information means all information made available to me as a member of the (title of the committee) for the purposes of participating in the committee, whether orally or in writing, and includes information that it is by its nature confidential or is designated by [insert name of the organisation] as confidential.

Conflict of interest includes any conflict of interest, any risk of a conflict of interest and any apparent or perceived conflict of interest arising through my engaging in any activity or obtaining any interest that is likely to conflict with or restrict me as a member in performing the work of the committee fairly and independently.

CONFIDENTIALITY

I undertake to maintain the confidentiality of any material and information that may come into my possession and confine discussions of this material and information to meetings of the committee. This information may be related to personal and health information collected for the purpose of patient care, or for administrative or statistical purposes. I will ensure that such information, whether in the form of paper documents, emails, computerised data or in any other form is stored in a secure manner and place.

Signing your name means that you have read and understood the information above, that you have had a chance to ask questions relating to this statement, and that you agree not to share protected health information outside the committee in any written, verbal, or email communications.

Name of Member

Signature of Member

Date:

Name of Witness

Signature of Witness

Date:

CONFLICT OF INTEREST

I attest to the best of my knowledge and after making diligent inquiry, at the date of signing this Statement, no conflict of interest exists or is likely to arise in the performance of my duties as a member of the committee. If, during the period of my appointment to the committee, a conflict arises in respect of my membership, I will notify the Chair of the committee and withdraw from any discussion or decision concerning such a matter.

Signing your name means that you have read and understood the information above and that you have had a chance to ask questions relating to this statement and understand that you must declare any conflict of interest to the Chair of the committee and withdraw from discussions if this is the case

Name of Member

Signature of Member

Date:

Name of Witness

Signature of Witness

Date

Other resource: Consumer Health Forum of Australia. Confidentiality guidelines.
<https://chf.org.au/publications/confidentiality-guidelines>

SOURCES: Department for Health and Ageing, Government of South Australia. 2012. Guideline Consumer and Community Advisory Committee / Group (CACAC / CAG) Policy Guideline and Toolkit; Agency for Healthcare Research and Quality. 2017. Working with Patient and Families as Advisors Implementation Handbook; Nepean Blue Mountains Local Health District. 2013. Consumer Representative Information Package.

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Attachment 7. 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 8. 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	

Attachment 9. 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.

Prepared by Health Issues Centre
February 2021

Attachment 10. 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

Prepared by Health Issues Centre
February 2021

Attachment 11. Interview guide for consumer positions – SAMPLE

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](#)

Prepared by Health Issues Centre
February 2021

Attachment 12. Consumer recruitment - Selection Criteria

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

Prepared by Health Issues Centre
February 2021

Attachment 13. 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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February 2021

Attachment 14. 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

Prepared by Health Issues Centre
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Attachment 15. 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”.⁷

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.”⁸

Consumer representative

⁷ Horvat, L 2019. Partnering in healthcare for better care and outcomes, Safer Care Victoria, State Government of Victoria, Melbourne. P. 38

⁸ 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”.⁹

[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.

⁹ 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.

Prepared by Health Issues Centre
February 2021

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.

[[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
February 2021

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>

Developed by Dr Tere Dawson for Cancer Australia, November 2013
Adapted for SCV, September 2017

Prepared by Health Issues Centre
February 2021

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

Attachment 18. Monitoring and evaluation

Q: How do we know that a consumer engagement project has made a difference to what we do?

Purpose of the community engagement project. A community engagement project may have diverse purposes. It is important to be **CLEAR** about the purpose of the project. Determine what is the purpose of the project such as:

- Opportunities to facilitate understanding through information sharing.
- Legislation and requirements (For example, ACSQHC Standard 2)
- Previous community engagement experiences.
- Democratic right of individuals to be involved in decisions affecting them and contribute to community building.
- The desirability of incorporating community values, interests and needs into decision making.
- Development of sustainable decisions.

A community engagement project has several phases:

1. Planning for the community engagement project
2. Developing a community engagement project
3. Implementing a community engagement project – Action Plan
4. Providing feedback to stakeholders and reporting to organisation

Evaluation questions for each one of these phases may include the following:

Phase one: Planning for a community engagement project and development of the project plan

- What is the purpose of the community engagement project?
- How do we know if the project plan has been designed to deliver a sustainable outcome?
- How do we know if the project plan is effective in dealing with stakeholder expectations?
- How do we know if the project had an effective governance team (e.g. advisory group?)
- How do we know the human and financial resources we will need to implement the project?
- What have we learnt from previous projects that needs to be dealt with before proceeding?

Phase two: Developing a community engagement project

- How will you know if the objectives of the community engagement project are being met and the project plan was designed to achieve outcomes as described?
- What will indicate if the key issues and interests of stakeholders have been identified?
- How will appropriate responses be developed to address stakeholder's needs and interests?
- How will you know if suitable techniques were selected to engage stakeholders?
- What can be learned from this phase that needs to be dealt with before proceeding?

Phase three: Implementing a community engagement project

- How will the project plan support the implementation of the community engagement project?
- What will indicate if the project plan is being co-ordinated effectively?
- How many people registered an interest in being part of the project advisory group?
- How will you know if the advisory group was effective?
- What can be learned from this phase that needs to be dealt with before proceeding?

Phase four: Providing evaluation report to stakeholders and reporting

- How will you collect and analyse project information for evaluation?
- Who will conduct the evaluation of the project? (internal/external)
- How will you ensure that the organisation report presents a balance of economic, technical, environmental, and social issues?

Suggested evaluation questions

Stakeholder evaluation questions might include:

- How did the process to undertake the community engagement project meet your expectations?
- Was the information provided during the community engagement project accessible, understandable, and delivered in a timely fashion?
- What opportunities did you have to participate in the community engagement project?
- Do you have any suggestions about what we could have done differently, better, or more of?
- What part of the project did you appreciate most?
- What did you find the least helpful?

Project team evaluation questions might include:

- How do you know that the community engagement project objectives have been met?
- What has changed as a result of the community engagement project?
- What was learned from the process?

Attachment 19. Evaluation methodology

The methodology selected to evaluate consumer engagement will need to include quantitative and qualitative measures, which are continually identified, assessed against consumer engagement objectives, and actioned through a feedback loop.

Quantitative methods are used to collect and measure numbers and statistics, such as the number of survey or questionnaires distributed and returned. The numbers are collated, summarised, and analysed as data. The data can be used to cross reference against other statistics to provide an accurate snapshot of a situation for use in decision making.

For example, demographic data can be used to cross check the statistical significance of the number of responses from specific age groups. Conclusions drawn from this information may indicate that the methods used to distribute a survey were not suited to young people. A process evaluation question to ask in this situation would be, “What needs to be done to gather information from young people?”

Qualitative methods are used to collect descriptions provided using language, such as, comments provided over the phone or face to face in meetings. The answers provided are interpreted and conclusions are drawn.

For example, a comment received indicates a stakeholder group do not feel enough information has been provided on the type of economic development that might be intended for the town. You may want to follow up from this comment and ask the group for further comment on what they think is possible; this would be more likely to keep the process open and engaging.

The value in combining qualitative and quantitative evaluation measures is that the quantitative data provides a clear picture of the frequency and rarity of selections. However the qualitative data provides the information that gives meaning to the selections and provides direction for further investigation or clarifies trends or differences in the data.

If evaluation measures are set throughout the process, areas for improvement and emerging problems will be identified early and the probability of a sustainable decision being achieved will be increased.

Adapted from: Heylen and Chappell. 2008. Community engagement handbook. A Model Framework for leading practice in Local Government in South Australia.

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Attachment 20. Evaluation questions

Consumer engagement evaluation: evaluation questions

You can use answer these questions to summarise the consumer engagement project you want to evaluate. This summary may also be useful to communicate to internal and external stakeholders and the community the project and outcomes of the project.

9. Describe what made the project successful.
10. Why was the project important to your community?
11. Why was it important to engage your community in this project?
12. Describe how you engaged the community
13. What tools and approaches did you apply to seek contributions from the community?
14. Describe the results
15. How did your community influence project outcomes?
16. What challenges were faced and how were they overcome?

EVALUATION QUESTIONS

What engagement tools did you use to make sure that the broader community had a voice in your project? Were these tools successful?

What quantitative data (i.e. number of participants) and what qualitative data (i.e. feedback from participants that indicates that the project was valuable to them) do you have to support your assessment?

How did you make sure that the community had access to the information that they needed to help them engage?

How did you make sure that the community were provided with genuine opportunities to engage?

What quantitative or qualitative data do you have to support your assessment?

Did you make sure that there were opportunities for the community to participate throughout the planning stages of the project?

What quantitative or qualitative data do you have to support your assessment?

Was information easy for people to understand?

Did you use plain language?

Did you limit the use of jargon and clarify key issues?

What quantitative or qualitative data do you have to support your assessment?

Were the community informed about how their contributions will be used? How?

Did you deliver your engagement project for the allocated budget? If no, why?

Have you explored what you can do better and how to overcome challenges?

Have you documented the internal and external barriers and challenges that emerged as you delivered the engagement project?

Have you explored how you overcame these barriers and challenges?

TIP: A lessons-learnt de-brief meeting is a useful way to explore the barriers and challenges to your engagement project. It is important that all members of the project team have an opportunity to attend this meeting so that they can explore the engagement project constructively.

Have you captured and shared these learnings so that they can be applied to your next community engagement project?

ADAPTED FROM: The State of Queensland, Department of Infrastructure, Local Government and Planning. 2017. Community engagement toolkit for planning. Brisbane. p. 83-84

Developed by Dr Tere Dawson
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