



Health Issues Centre
Consumer voices for better healthcare

Evaluation of consumer engagement for organisations- Template

This evaluation tool is to be used to evaluate consumer engagement from the perspective of the organisation. The findings should be used to identify areas for improvement.

Please respond to the questions below trustfully. Your feedback will help us to improve the process of engagement of consumer representatives in your research team.

The information in anonymous

Evaluating the process of consumer engagement

Sample indicators

- Clear articulation of roles and responsibilities
- Clearly defined task(s)
- Patient/family and staff satisfaction with process
- Early involvement
- Transparency of decision making process
- Representativeness
- Timeliness, participation rate and costs

Sample questions

- Was the decision and rationale to engage consumers communicated to the staff and consumers engaged? If so, explain how
- How many consumers participated in the engagement activity?
- Were diverse consumers engaged including seldom heard groups)?
- Was there support for consumers provided? (E.g. orientation or induction; briefing and debriefing before and after meetings; remuneration or reimbursement for out-of-pocket expenses; training or mentoring, etc.? If so, what support was provided?
- Was staff time within estimates?
- Were costs within budget?

Evaluating the outcome of consumer engagement

Sample indicators

- Engagement goal and expectations met
- Influence/contribution of consumers on decisions
- Consumer experience of being heard and understood
- Effect on staff attitude towards consumer 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?
 - If so, explain how
 - If not, explain why
- Did the consumer engagement activity contribute to the research team's aim/objective?
 - If so, explain how
 - If not, explain why
- Was input from the consumers included in the decision-making process?
 - If so, explain how
 - If not, explain why
- What would you do differently next time?

Evaluation of consumer engagement in research teams

1. ORIENTATION

1.2. On the rating scale below, how do you rate the usefulness of the orientation provided to the consumer representatives

0	1	2	3
Not useful	Limited usefulness	Useful	Very useful

1.3 **What changes would be made to the orientation process to make it more useful?**
[For example better timing, less or more targeted content, better written/easy English, use visual aids, etc.]

2. IMPLEMENTATION

2.1 **Are you aware of any actions or changes that have occurred as a result of the advice or recommendations provided by consumer representatives?**

If yes, please give details

If no, please make any comments

3. RELATIONSHIP WITH CONSUMERS AND COMMUNITY MEMBERS

3.1 **Do consumer representatives have links with consumers and community groups**

0	1	2	3
No links	Some links	Good links	Excellent links

Describe these links and think how these links can be improved

Think how you can engage consumers who have links with consumer and community groups [For example, make a list of condition-specific groups relevant to your research; consult with health services/universities/local government councils about community groups that may be interested in your research; make contact/out-reach to these groups, present your research and invite members to engage in your research.

3.2 **Have you provided opportunities to consumer representatives to learn from, communicate with and/or consult with various consumers/consumer groups during their engagement?**

Receiving reports and presentations from staff about consultation with consumers or patients	
Participating in consultations with patients/consumers/community members	
Attending meetings with local community groups or organisations	
Attending meetings with other consumer representatives	
Receiving information from other consumers representatives about their work with patients or the broader community	
Other	

If no, please make any comments

4. MEETING STRUCTURE AND PROCESS

4.1 Consumers were able to share ideas and opinions during meetings

0	1	2	3
Strongly disagree	Disagree	Agree	Strongly agree

What changes could be made to support consumer participation?

[For example, set aside time for consumer input in the agenda; consult previously to the meeting and bring these ideas forward at the meeting; ask the consumers how they would prefer to contribute at meetings?]

4.3 Identify any key barriers to consumer representatives participating in meetings?

There were too many items on the agenda	
There were dominant voices at the meeting which were not managed effectively	
The Chair did not introduce the consumer to the committee	
There were no administrative or secretarial support provided	
There were no opportunities to brief and debrief before and after meetings	
The matters discussed and the language used were complex and difficult to understand	
It was unclear how the consumer contribution and input were going to influence decisions	
There was little follow-up, action and/or feedback of matters consumers raised at meetings	
Other	

What changes could be made to address these barriers?

[For example, provide information and support to the Chair and members about the role of the consumer and how to include them in meetings; set aside time to meet the consumers before and after meetings; follow up with consumers about their contributions]

5. SUPPORT FOR CONSUMER REPRESENTATIVES

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

Terms of Reference and clarity of the role of the consumer representative	
Consumer engagement policy or strategy	
Training for Chairs and staff supporting the committee	
Training for consumers	
Overview of key research agencies/funders	
On-going information of some of the key programmes where consumer engagement is a key and integral element	
Building networks with other consumer representatives (outside research)	

6. ACHIEVEMENTS

What has been the major consumer engagement successes in the past 12 or 24 months?

7. REFLECTION

What will you do different next time?

Sources: Alberta Health services. 2014. A Resource Toolkit for Engaging Patient and Families at the Planning Table.

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