

Meeting with Patient and Family Partners for the first time

Before working with patient and family partners matched to your engagement, it is important to meet with them. This allows you to clarify your engagement and start building the relationship.

Our partners are people who (mostly) do not work in healthcare. They may not understand how the system operates. To have a successful engagement, you need to create a relationship with clear expectations. This is also your chance to understand what they expect or need from you. For example, if a partner is hard of hearing, they may need specific supports in team meetings.

The first meeting is also your opportunity to acknowledge the perception of power imbalances. It is important to discuss this and reinforce that the partner is an important member of the team.

Setting up the first meeting

The Patient and Family Experience Team will introduce you by email to partners who have volunteered for your engagement.

If you need support in planning or conducting the first meeting, please reach out to the patient experience team.

- Contact your partners and set up a 30 minute meeting. If more than one partner is joining your engagement, you can set up a meeting with all of the partners at the same time.
- Zoom is best so you can see each other but a phone meeting works as well. Not all partners have reliable internet connections.
- If you have five or more partners, consider asking a colleague to help you facilitate the meeting. Also, make the meeting 60 minutes.

What to do during the meeting

1. Introduce yourself

- a. Tell the partner(s) about your role at BC Cancer as well as your role in the engagement.
- b. Remember, the partner is not your work colleague. This is a person volunteering their time. Try to be informal but organized. Speak as if you are having a conversation with a friend or relative.
- c. If other team members are at the meeting, they should also introduce themselves.
- d. Do not use acronyms or medical jargon.

2. Ask partners to introduce themselves

- a. Ask the partner to tell you why they volunteered for the engagement.
- b. This is your opportunity to get to know a bit about the partner and understand how to communicate with them. Remember, you want to understand their perspective and the influence it will have on the project. Active listening skills are key! We often hear from partners that they share their experience through storytelling. Make space for partners to share their story.

3. Talk about your engagement.

- a. What is the purpose of your engagement? What is the problem you are trying to solve? Speak about it in a way the partner can understand.

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- i. For example, if you are redesigning the reception area, be specific about what you are asking. You may be asking the partner how best to organize the chairs so that patients and caregivers are most comfortable.
- b. What is the partners’ role? What exactly will they do? Be specific!
- c. How long do you expect the engagement to run? How much time will the partners need to commit to the engagement?
- d. Who is involved in the engagement, other than yourself?
- e. What influence will the partners have on the engagement?
 - i. Be practical and honest. What will you be doing with their input? For example, you will write down their ideas and consider them in your decisions.
 - ii. Review the IAP2 Spectrum of Public Participation so you can accurately describe the partners’ level of influence:

INCREASING IMPACT ON THE DECISION

| | INFORM | CONSULT | INVOLVE | COLLABORATE | EMPOWER |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|
| PUBLIC PARTICIPATION GOAL | To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions. | To obtain public feedback on analysis, alternatives and/or decisions. | To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered. | To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution. | To place final decision making in the hands of the public. |
| PROMISE TO THE PUBLIC | We will keep you informed. | We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision. | We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision. | We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible. | We will implement what you decide. |

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- f. If there are regular engagement meetings already scheduled, confirm partner(s) can attend. If meetings are not scheduled, confirm partner availability so you can work around their schedules.
 - i. An alternative is to have a separate touch base with the partners after the meetings to discuss items that could benefit from partner input.
 - ii. Ask the partner if they need any support to feel comfortable in the meetings.
 - iii. Send meeting agendas and materials with ample time for partners to review and prepare.

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- g. Clarify how you will keep in touch with partners and how you will report back on the engagement outcomes.
- h. Ask the partner if they have any questions.

4. Thank them for their time and outline next steps.

After the meeting

- Email the partners to thank them for the meeting and confirm they are still interested in participating. Outline next steps and include any documents the partners need to be prepared for the engagement.
 - CC the patientexp@bccancer.bc.ca on the email
- If after meeting with the partner, you feel they are not a good fit for your engagement, contact the Patient and Family Experience team at patientexp@bccancer.bc.ca

Resources

- [Best practices for a successful engagement](#)
- [Planning an engagement](#)
- [Culturally safe engagement: Companion guide](#)