


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 individuals who (mostly) do not work in healthcare. They may not understand how our complex system operates. To engage them meaningfully, you need to create a trusting relationship with clear expectations. This is also your chance to understand what they might need from you to support their participation (i.e. – information, accessibility support, guidance, etc.).

 **REMEMBER:** *The first meeting is also your opportunity to acknowledge the perception of power imbalances. To build trust, it is important to discuss this and reinforce with the project team that the partner is an important member of the team.*

Setting up the First Meeting with Partners:

The Patient and Family Partnerships & Experience (PFPX) team will provide you with the partners' contact information once they are matched to your engagement opportunity.

- Contact the partners and set up an introductory call. Please cc patientexp@bccancer.bc.ca on the e-mail to ensure we can provide support if needed. Based on partner preferences, you can either bring all partners together for a group meeting or connect with them individually in a 1:1 call.
- Meeting virtually (e.g. Microsoft Teams) is best so you can see each other but a phone meeting works as well. Make sure to check with the partners that a virtual meeting works for them.
- If you have five or more partners, consider asking a colleague to help support you during the meeting. Also, make the meeting 60 minutes.

What to cover off in the first meeting:

- ❑ **Provide a meaningful land acknowledgement.** Take time to learn about the lands you are joining from, prepare a thoughtful land acknowledgement in your own words, and intentionally include it as part of your meeting. Refer to "[Culturally Safe Engagement: What Matters to Indigenous \(First Nations, Metis and Inuit\) Patient Partners?](#)" to learn more.

- **Introduce yourself and your role**, as well as how you will support the engagement. If other team members/staff are at the meeting, they should also introduce themselves.


- **Ask the partner(s) to introduce themselves and why they were interested in the engagement.** This is your opportunity to get to know the partners better and understand how best to communicate with them. Make space for them to share stories and practice active listening.

- **Provide some background about the engagement.** Share the project/initiative goals and the purpose of engagement. What is the problem you are trying to solve or the decision you need to make? Speak about it in a clear way so that the partner can easily understand. For example, if you are engaging partners on redesigning a clinical reception area, be specific about what you are asking. You may be asking the partner how best to organize the seating layout, or where to place signage, or how best to address check-in workflow so that patients and families feel most comfortable.
 - **What is the partners' role?** How will they participate and what do you want to understand from them? Be specific!
 - **What are the timelines?** How long will the engagement last and how much time do the partners need to commit? If regular meetings are already scheduled, confirm attendance. If meetings are being planned, check partner availability.
 - **Where will engagement take place?** Be sure to check in with partners about their participation preferences, including whether they need support with transportation, parking, mileage, or taxi fares for in-person meetings.
 - **What level of influence will the partners have on the engagement?** Review the [Spectrum of Engagement](#) so you can accurately describe the partners' level of influence.
 - **Be practical and honest to manage expectations.** What will you be doing with their input? Who will you be sharing their input with and how will it be used to support decision-making?
 - **Tell them who will be involved in the engagement and their roles** (staff, other partners, etc.)

- **Clarify how you will communicate** and keep partners informed of any updates or engagement outcomes.

To wrap up the meeting:

- ☐ **Ask if there is any support partners need to feel comfortable** in the meetings.
- ☐ **Check if the partners have any questions** and answer them to the best of your ability. Follow up with them if you need to find answers to their questions.
- ☐ **Thank partners for their time and let them know what will happen next.**
- ☐ **Make sure they know how to get in touch with you** should they have any additional questions or concerns.

 **REMEMBER:** *Patient and Family Partners are contributing their time and, in many cases, bravely sharing their experiences. Do your best to be informal but organized. Speak as if you are having a conversation with a friend. Provide support when needed.*

If after meeting with the partner, you feel they are not a good fit for your engagement, contact the PFPX team at patientexp@bccancer.bc.ca.

Helpful Resources:

[PHSA Patient & Family Framework](#)

[Health Quality BC's Guide to Authentic Engagement](#)

[Culturally Safe Engagement: What Matters to Indigenous \(First Nations, Metis and Inuit\) Patient Partners](#)

[BC Cancer Patient & Family Engagement Resources](#)

Questions?

Contact the PFPX Team to help plan engagement that's inclusive, respectful, and impactful.

Email: patientexp@bccancer.bc.ca

Fill out a [request form](#)