

Patient & Family Engagement-Capable Meetings & Agendas

Thank you for choosing to partner with Patient & Family Partners (referred to as “partners” in this document). Their perspectives strengthen your committee or project by helping you understand what matters most to the people your work impacts.

Inviting partners is only the first step. To support *meaningful* engagement, design meetings and project work so that patients and families can participate fully and comfortably.

One effective way to do this is by creating **engagement-capable agendas**. These agendas are structured to encourage inclusive discussion and reflect the guiding principles and levels of engagement described in the [PHSA Patient and Family Engagement Framework](#).

As you plan your work, keep this in mind: **every decision in healthcare—clinical, operational, or financial—shapes the lives of patients and families.**

We use the term “families” to include family members, chosen family, and caregivers.

Questions to consider when creating engagement-capable meetings and agendas

- What is the goal of the meeting and how will patient/family feedback influence decisions?
- Are you engaging Partners at a level higher than inform? Inform is a part of each engagement process, (provide patients with enough information to participate) but should never be the only level you reach when engaging partners meaningfully. View the PHS
- Are you flagging agenda items that will benefit most from patient/family perspectives? (consider that all decisions and actions impact patients and families at some point)?
- Are you providing all the information ahead of time that patient and family partners need to fully participate in discussions (Provide enough time for partners to review and include this time in your honoraria budget. Partners normally receive [honoraria](#) for their participation on engagement projects)?
- Are you allowing time for meaningful discussion with partners, and not just updates that are no longer open to feedback?
- Is your agenda in plain language? Does it avoid jargon and spell-out acronyms?
- Are you including dedicated time to invite insights from patients and families?



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- Does your committee or meeting have a facilitator or Engagement Lead who supports patients and families to speak up and serves as their primary point of contact for questions?
- Would your engagement be strengthened by appointing a partner to co-chair meetings?
- Are you acknowledging and documenting the contributions of patients and families?
- How will you share with partners how their input influenced decisions, using a “What You Said/What We Did” approach? This can include both small adjustments and larger changes.
- How will you share patient and family input with leaders and decision-makers?
- How will you prioritize connection? (In-person opportunities, time to connect in meetings, etc.)

See Appendix A for a worksheet to plan patient & family engagement capable meetings & agendas

Questions you can use to engage patients and families

Within your agenda items & discussions, you can use these questions to explore patient and family experiences and encourage partner participation.

Use these questions to help you plan or make decisions

IMPACT ON PATIENTS & FAMILIES	<ul style="list-style-type: none"> • From a patient/family lens, what resonates with you about this plan? • Does the plan focus on what matters to patients and families? • How would this decision impact patients and families? • What could we change (within scope) to make the process more patient & family-friendly?
COMMUNICATING WITH PATIENTS & FAMILIES	<ul style="list-style-type: none"> • What do patients and families need to know about this plan, and what is the best way to communicate it to them?
CULTURAL SAFETY & EQUITY	<ul style="list-style-type: none"> • Are there cultural needs to consider? • Does the plan consider the needs of underserved communities (including Indigenous patients, newcomers and those with systemic or language barriers)?
PATIENT & FAMILY ENGAGEMENT	<ul style="list-style-type: none"> • Do you feel more patient & family engagement is needed to support decision-making?

Use these questions to better understand experiences with services or care

- What would have helped improve your experience with BC Cancer services?
- What made your care experience more challenging?
- What do you wish you knew before starting treatment/receiving care?
- What did you find most helpful during your care experience?
- Where did you find/receive the most helpful information?
- Were you supported to be engaged and involved in your/your loved one’s care?
- Was your family or caregiver involved as much as you wanted them to be?

Other ways to support meaningful patient & family engagement during meetings



Checklist: Things to include on your engagement-capable agenda



- Date, time, location and frequency of meetings
- List of committee members, guests and their roles
- Time at first meeting for thorough introductions (as well as when new people join)
- Time to connect before diving into content – use an ice-breaker question that both staff and partners will find meaningful
- Include the level of engagement (Inform, Gather, Involve, Collaborate, Lead) for each agenda item. This helps manage expectations about how input will be used and supports you to structure the discussion in a way that aligns with the level of engagement you are seeking.
- Dedicated time built into agenda items, or include a specific agenda item, for partners to share their insights.
- Time to do a check out or ask any final questions
- The name of a contact person partners can reach out to if they have questions
- Time to close the loop on any previous action items or input

See Appendix B for a sample agenda.

Contact patientexp@bccancer.bc.ca to plan engagement that's inclusive, respectful, and impactful or fill out an [Engagement Request Form](#). To find more resources on engaging patients and families, click [here](#).

Appendix A – Worksheet to plan patient & family engagement capable meetings & agendas

Fill out the table below to help you plan your patient and family engagement meeting/agenda

<p>What is the goal of engagement? What do you want to know from patients and families?</p>	
<p>What is the appropriate level of engagement for your goals? <i>Inform should never be the only level you reach when engaging partners meaningfully.</i></p>	<p><input type="checkbox"/> Inform – keeping people informed, providing info to engage meaningfully <input type="checkbox"/> Gather – Listening intently to guide planning and decisions <input type="checkbox"/> Involve – Embedding your insights and perspectives <input type="checkbox"/> Collaborate – Working together and committing to shared decision-making <input type="checkbox"/> Lead – Looking to you for leadership & guidance</p>
<p>How are you going to ensure that partners have time to provide input during your meeting?</p>	
<p>How are you going to ensure that the rest of the meeting participants understand the role of Partners?</p>	
<p>Who will support your Partners on the project/committee?</p>	
<p>Would your meeting benefit from a patient/family co-chair?</p>	
<p>How will you prioritize connection before content?</p>	
<p>How will you ensure that patient/family input is shared with decision-makers?</p>	
<p>How will you follow up with Partners and share how their input will be used?</p>	

Appendix B – Sample agenda to support patient/family engagement

Committee/Project Name

Agenda

Meeting Date: Month, Day, Year

Meeting Time: X:00 to X:00 am/pm

Location: Physical Location or Teams Link

Team Members/Attendees

First Last, Role	First Last, Role
First Last, Role	First Last, Role
First Last, Role	First Last, Role

Agenda Item	Description	Level of Engagement	Lead	Time
1	Welcome & Land Acknowledgement <i>Land Acknowledgement: We are gathered here today on the traditional, ancestral and unceded territory of the Coast Salish Peoples, specifically the traditional territory of the Squamish, Tselil-Watuth and Musqueam Nations. We are thankful for their care of the lands and waters since the beginning of time. This acknowledgement extends to all First Nations.</i>			
2	Introductions & Connection <ul style="list-style-type: none"> Introduce new members/guests Ice-breaker 		All	
3	Project Updates	Inform	Name	
4	Agenda Item	Gather	Name	
5	Agenda Item	Involve	Name	
6	Partner Reflections	Gather	Patient & Family Partner	
7	New Business		All	
8	Close the Loop		All	
9	Check Out		All	
10	Next Meeting			

Please get in touch with john.smith@bccancer.bc.ca if you have any questions or can no longer attend the meeting.

You can also include this spectrum-guide as part of your agenda to support patient & family engagement.

Spectrum of Engagement

	Impact on Decision				
	Inform	Gather	Involve	Collaborate	Lead
Our role/commitment	Keeping you informed	Listening intently	Embedding your insights and perspectives	Collaborating with you and committing to shared decision making	Looking to you for leadership and guidance
Purpose	To share relevant, timely information	To gather patient and family perspectives and feedback	To engage in dialogue with patients & families to understand and consider their insights and perspectives	To partner with patients and families toward a common goal	To recognize and uphold patients and families as leaders, with final decision-making authority
Example techniques Keep in mind that many techniques can be applied across multiple levels of the IAP2 spectrum.	<ul style="list-style-type: none"> • Fact sheets • Websites • Social media blasts • Emails • Newsletter • Open houses 	<ul style="list-style-type: none"> • 1:1 interviews • Focus groups • Surveys • Public meetings • Storytelling 	<ul style="list-style-type: none"> • Workshops • Working groups • World cafés • Document reviews • Developing survey questions • Interview hiring panel 	<ul style="list-style-type: none"> • Advisory committees • Steering committees • Consensus-building activities • Patient journey mapping • Presentations 	<ul style="list-style-type: none"> • Co-design • Delegated decisions • Leading education for staff or leaders • Board Members