

PUBLIC AND PATIENT ENGAGEMENT EVALUATION TOOL

VERSION 1.0 (JUNE 2015)



PUBLIC AND PATIENT ENGAGEMENT EVALUATION TOOL

PARTICIPANT QUESTIONNAIRE

VERSION 1.0 (JUNE 2015)

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The PPEET instruments are generic tools designed primarily to help organizations assess their engagement activities. The authors do not take responsibility for the improper use of the PPEET instruments.

Funding:

The development of the PPEET instruments was supported by research funding from the Canadian Institutes of Health Research and from direct and in-kind contributions from the following organizations: Alberta Health Services, Centre for Health Economics and Policy Analysis (CHEPA) - McMaster University, New Brunswick Health Council, North West Local Health Integration Network, NorWest Community Health Centres, Nova Scotia Health Authority, Nova Scotia Health Research Foundation, Ontario Ministry of Health and Long-Term Care, Participedia, Saskatoon Health Region, Vancouver Coastal Health, Winnipeg Regional Health Authority.

For additional information on the PPEET, please visit our website at:

www.fhs.mcmaster.ca/publicandpatientengagement

Guidance for organizations administering this questionnaire:

The purpose of this questionnaire is to obtain participants’ assessments of key features of the engagement activity that they have participated in. It is designed to be administered to a broad range of individuals including service users, citizens, community representatives and other stakeholders contributing to a wide range of activities related to the planning, delivery and evaluation of health services.

The questions included in the questionnaire were selected because they represent the core features of many PPE activities and, as a whole, will provide a comprehensive assessment of engagement activities in a wide range of organizations that will facilitate comparison and learning across different types of engagement activities, organizations and health system settings. You may wish to supplement these questions with additional questions that reflect the unique features of your engagement activity or organization. However, we discourage the removal or re-wording of questions as this limits comparability.

Note: For some PPE activities, you may want to collect demographic information from your participants. For this purpose, we have included some sample questions in Appendix 1 drawn from commonly used PPE evaluation tools.

We are interested in your feedback about how well this tool worked in your organization. Please provide your feedback at

<http://www.fhs.mcmaster.ca/publicandpatientengagement/feedback.html>

INSTRUCTIONS

- We are interested in your feedback about the engagement activity that you recently participated in *[optional: insert description and objectives of engagement activity as a memory prompt for respondents]*
- The questionnaire is composed of several statements. Please indicate your level of agreement with each statement and check only one box for each statement.
- Please provide additional feedback in the comment boxes provided throughout the questionnaire.
- All information you provide will remain confidential.
- Thank you very much for your participation!

TITLE OF ENGAGEMENT ACTIVITY:

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
The purpose of the activity was clearly explained.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The supports I needed to participate were available (e.g., travel, child care, etc).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I had enough information to contribute to the topic being discussed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was able to express my views freely.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I feel that my views were heard.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A wide range of views on the topic were expressed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
I feel that the input provided through this activity will be considered by the organizers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The activity achieved its stated objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I understand how the input from this activity will be used.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I think this activity will make a difference.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
As a result of my participation in this activity, I am better informed about <i>[administering organization to insert relevant term here, e.g., PPE issue, organization, health system, other topic of focus]</i> .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
As a result of my participation in this activity, I have greater trust in <i>[administering organization to insert relevant term, e.g., providers, PPE staff, organization as a whole, health system, personal competency]</i> .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall, I was satisfied with this activity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
This activity was a good use of my time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Open-ended questions:

1. How do you think the results of your participation will be used?

2. What was the best thing about this engagement activity?

3. Please identify at least one improvement we could make for future engagement activities.

Additional comments:

Appendix 1: Optional Demographic Questions

Note to questionnaire administrators: The following is a list of optional socio-demographic questions that may be useful to include as part of the participant evaluation where there is minimal prior knowledge about participants and where there is an interest in gaining a deeper understanding about participant backgrounds and the extent to which they represent communities affected by and relevant to the topic or issue that is the focus of the engagement activity.

Finally, we would like to get a little more information about you.

1. What year were you born? _____
2. What is your sex?

<input type="checkbox"/>	Male
<input type="checkbox"/>	Female
<input type="checkbox"/>	Other: _____

3. Are you a member of any of the following groups? (Please check all that apply)

<input type="checkbox"/>	Visible minority
<input type="checkbox"/>	Persons with disabilities
<input type="checkbox"/>	Aboriginal
<input type="checkbox"/>	Recent immigrant to Canada
<input type="checkbox"/>	Other: _____

4. What is the highest level of education that you have completed?

<input type="checkbox"/>	No schooling
<input type="checkbox"/>	Completed elementary school
<input type="checkbox"/>	Completed high school
<input type="checkbox"/>	Completed community college
<input type="checkbox"/>	Completed technical school
<input type="checkbox"/>	Completed Bachelor's Degree (Arts, Science, etc.)
<input type="checkbox"/>	Completed post graduate training or Professional or graduate degree

5. What is your current work status?

<input type="checkbox"/>	Working for pay full time (including on strike and any form of leave)
<input type="checkbox"/>	Working for pay part time (including retired part time, homemaker part time)
<input type="checkbox"/>	Not in labour force, able to work
<input type="checkbox"/>	Not in labour force, unable to work
<input type="checkbox"/>	Retired
<input type="checkbox"/>	Student (includes students working part time)
<input type="checkbox"/>	Homemaker

6. To which of the following income category do you belong, before taxes and deductions.

<input type="checkbox"/>	Less than \$20,000
<input type="checkbox"/>	Between \$20,000 and \$40,000
<input type="checkbox"/>	Between \$40,000 and \$60,000
<input type="checkbox"/>	Between \$60,000 and \$80,000
<input type="checkbox"/>	More than \$80,000

7. Have you ever worked for pay in a healthcare profession?

<input type="checkbox"/>	Yes
<input type="checkbox"/>	No

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PROJECT QUESTIONNAIRE

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Guidance for organizational personnel administering this questionnaire:

The purpose of this questionnaire is to assess the planning, execution and impact of the engagement activity after it has been completed. The most appropriate users of this questionnaire are those most directly involved in the engagement activity (e.g., project lead, manager or director). External partners (e.g., community stakeholders and collaborators) may also contribute to the completion of this questionnaire (see for example, the collaboration and common purpose section).

Note: The questions included in the questionnaire were selected because they represent the core features of many PPE activities and, as a whole, will provide a comprehensive assessment of engagement activities in a wide range of organizations that will facilitate comparison and learning across different types of engagement activities, organizations and health system settings. You may wish to supplement these questions with additional questions that reflect the unique features of your engagement activity or organizations. However, we discourage the removal or re-wording of questions as this limits comparability.

We are interested in your feedback about how well this tool worked in your organization. Please provide your feedback at
<http://www.fhs.mcmaster.ca/publicandpatientengagement/feedback.html>

Title of engagement activity: _____

INSTRUCTIONS

- We are interested in your feedback about the engagement activity that you were recently involved in as project lead, manager or director.
- The questionnaire is composed of several statements. Please indicate your level of agreement with each statement and check only one box for each statement.
- Please provide additional feedback in the comment boxes provided throughout the questionnaire.
- All information you provide will remain confidential.
- Thank you very much for your participation!

Please describe your role in this engagement activity:

A. Integrity of Design and Process

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
The project plan had a clear strategy to identify and recruit those most affected by the decision.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The project plan had a clear strategy to involve an appropriate and relevant population that matches the characteristics of those most affected by the decision (e.g., socio-demographic profile, geographic profile, etc).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Those most affected by the decision were appropriately represented in the engagement activity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
The project plan included clear documentation of how the financial, logistical, and informational needs of participants (e.g., travel, dietary, interpretive, childcare, etc) would be accommodated.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adequate time was allocated to plan and implement the PPE activity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The project plan included a clear statement of PPE objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The project plan included a clear statement about how goals and expectations for the PPE activity would be shared with participants.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The project plan included clearly described strategies for communicating with participants.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The project plan indicated how PPE input would be used.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The project plan included a clearly detailed process for communicating with participants about how PPE input would be used.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All communications with participants throughout the engagement activity were well executed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please describe how the participant input summary report that was prepared was used and shared with participants. If no summary report was prepared, is there a plan to do so? If not, explain why.

B. Influence and Impact

	Yes	No	Don't know	Comments
Members of the organization's leadership received a summary report of the PPE input (e.g., program manager, senior management).				
The results of the PPE activity were shared directly with the senior leadership or the Board (through presentations or consultations).				
Members of the organization's leadership considered the PPE input.				
Members of the organization's leadership used the PPE input to influence decisions related to health care improvement.				

Please describe how and at what stages the PPE input was considered in organizational decisions (list relevant sources of evidence for your response). If the input was not considered, explain why you think this was the case.

Please describe what impact or influence the PPE input had on any decisions made within the organization (and list relevant sources of evidence). If the input did not have any impact or influence, explain why you think this was the case.

C. Collaboration and common purpose

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
We were able to identify shared goals with other organizations through the PPE activity initiated.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We were able to achieve these shared goals through the PPE activity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
As a result of our involvement in this initiative, our organization has developed a greater trust in other organizations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
As a result of our involvement in this initiative, our organization has a greater intention to collaborate with other organizations in the future.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please list the names of the organizations that you collaborated with during the engagement activity and what plans, if any, you have for future collaborations with these organizations.

D. Summative Questions

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
Overall, I was satisfied with this PPE activity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
This PPE activity was a good use of our program resources.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The output from this PPE activity enhanced decision making in this area.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I would like to participate in PPE training to build my capacity to do more of this work.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I will be more comfortable leading a PPE activity in the future.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional comments:

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ORGANIZATION QUESTIONNAIRE

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Guidance for organizational personnel administering this questionnaire:

The purpose of this questionnaire is to assess the organization’s capacity for and culture of public and patient engagement. The questionnaire is aimed at senior leadership within the organization, such as Board members, the executive team, department leads, managers, senior project leads and/or project sponsors, and organization partners. Results from this questionnaire will be useful for tracking trends over time, to document improvement in PPE, and to perform annual audits.

Note: The questions included in the questionnaire were selected because they represent the core features of many PPE activities and, as a whole, will provide a comprehensive assessment of engagement activities in a wide range of organizations that will facilitate comparison and learning across different types of engagement activities, organizations and health system settings. You may wish to supplement these questions with additional questions that reflect the unique features of your engagement activity. However, we discourage the removal or re-wording of questions as this limits comparability.

We are interested in your feedback about how well this tool worked in your organization. Please provide your feedback at
<http://www.fhs.mcmaster.ca/publicandpatientengagement/feedback.html>

INSTRUCTIONS

- We are interested in your views about and general attitudes toward the public and patient engagement (PPE) policies and processes in your organization.
- As you are responding to the questions below, try to think about how the organizational requirements for public and patient engagement influence your work.
- The questionnaire is composed of several statements. Please indicate your level of agreement with each statement and check only one box for each statement.
- Please provide additional feedback in the comment boxes provided throughout the questionnaire.
- All information you provide will remain confidential.
- Thank you very much for your participation!

Please state whether you are an employee of the organization or a member of the Board: _____

A. Policies and practices that support PPE planning and implementation

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
An explicit strategy exists to guide the planning of public and patient engagement (PPE) activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explicit organizational documents articulate the approach and values that will inform PPE planning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization has explicit strategies for identifying and recruiting relevant public and patient participants depending on the engagement activity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There is direct resourcing for PPE within the organization (i.e., through dedicated PPE unit and/or staff).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
There are resources available for PPE within departments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization is committed to providing summary reports of PPE activities to participants and stakeholders.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional comments:

B. Participatory culture

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
A commitment to PPE values and principles is found in key organizational documents (e.g., mission and vision, strategy, etc.).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A commitment to PPE values and principles is demonstrated through the structure of the organization (e.g., dedicated PE leadership positions).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
The organization actively participates with provincial/national/international PPE organizations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PPE is articulated in job descriptions for staff who are leading and supporting these activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comprehensive PPE training and materials are available to support staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have adequate training in PPE to support me in my role.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organizational leaders ensure that public and patient input is used in service planning and decision making.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organizational leaders ensure that processes are in place to engage the community when planning services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization seeks public and patient input when doing financial planning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization seeks public and patient input when planning capital projects.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
The organization seeks public and patient input when considering patient safety and quality of care.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am confident participating in opportunities where PPE takes place.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional comments:

C. Influence and Impact

****Please note that the rating scale has changed in this section****

	All of the time	Some of the time	Rarely	Never	Don't know
PPE reports are sent to relevant pre-determined users in the organization (e.g., program manager, senior management, board members).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organizational leaders/program areas report using input from PPE activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am aware of PPE activities that have influenced relevant decisions at the program level.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	All of the time	Some of the time	Rarely	Never	Don't know
I am aware of PPE activities that have influenced relevant Board decisions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional comments:

D. Collaboration and common purpose

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
As a result of our PPE work, we have identified shared goals with our partners (public, funders, stakeholders).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
As a result of our PPE work, we have built trust with our stakeholders (e.g., public, funders, community organizations, government departments).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
As a result of our PPE work, we have developed collaborative relationships with our stakeholders (e.g., public, funders, community organizations, government departments).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional comments:

E. Summative Questions

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
Overall, I believe our organization has an appropriate level of engagement activity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall, I believe our organization devotes an appropriate level of resources to support engagement activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional comments about PPE in our organization: