

**PUBLIC AND PATIENT ENGAGEMENT EVALUATION TOOL
(PPEET)**

**Version 2.0
August 2018**



Public and Patient Engagement Evaluation Tool



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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.

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INTRODUCTION TO THE PPEET

This package includes three questionnaires that comprise the Public and Patient Engagement Evaluation Tool (PPEET): the participant questionnaire, the project questionnaire, and the organization questionnaire. When used together, the PPEET questionnaires provide a comprehensive evaluation of public and patient engagement within your project and/or organization.

History of the PPEET

This document is the product of a Canadian collaboration of researchers and public and patient engagement practitioners led by McMaster University. In 2011, the Public and Patient Engagement (PPE) Research-Practice Collaborative was formed with the aim of developing a common evaluation tool that could be used in a variety of health system organizations across Canada to collectively contribute to improvements in the quality of PPE practice across the country. The result of this work was the Public and Patient Engagement Evaluation Tool (PPEET).

The initial 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.

The PPEET was revised in 2018 based on the results of a comprehensive implementation study. Seven health system organizations participated in the study, implementing the PPEET and providing feedback on its usefulness from the perspective of those implementing the tool and those completing the tool. This study and the PPEET revisions that have resulted from it were supported by funding from the Government of Ontario through a Health System Research Fund (HSRF) grant and the Ontario SPOR Support Unit, which is supported by the Canadian Institutes of Health Research and the Government of Ontario. The following organizations also provided in-kind contributions: Cancer Care Ontario, Children's Hospital of Eastern Ontario (CHEO), Hamilton Health Sciences, Health Quality Ontario, McMaster University, NorWest Community Health Centres, Toronto Central Local Health Integration Network (LHIN), and University Health Network.

How were the questionnaires developed?

The development of the original PPEET is described in detail elsewhere¹. Questions were chosen to reflect the core features of many PPE initiatives and the principles guiding high-quality engagement. As

¹ Abelson, J., Li, K., Wilson, G., Shields, K., Schneider, C., & Boesveld, S. (2016). Supporting quality public and patient engagement in health system organizations: development and usability testing of the Public and Patient Engagement Evaluation Tool. *Health Expectations*, 19(4): 817-827. <https://doi.org/10.1111/hex.12378>

a collection, the questionnaires facilitate the comprehensive assessment of engagement as well as comparison and learning across different types of engagement activities, organizations and health system settings. The PPEET was modified based on feedback provided through the implementation study both from participants and those implementing the questionnaires within organizations.

Can we add additional questions or change the wording of suggested questions?

You may wish to supplement the PPEET questions with additional questions that reflect the unique features of your organization. However, we discourage the removal or complete re-wording of questions as this limits comparability between and within organizations if the questionnaires are being used repeatedly to assess changes over time.

How can we administer these questionnaires?

The questionnaires can be administered via paper copies or programmed into an electronic survey platform such as SurveyMonkey, LimeSurvey, or Google Forms. If you choose to use an electronic format to administer the questionnaires, consider the following:

- When using electronic tools, respondents prefer having an option to go back to previous answers to review responses, change a response or add more information to a response. This back button should be clearly displayed as part of the platform.
- Ensure that the platform you select is appropriate for all users and abilities or offer accommodations as necessary. Also, some respondents may prefer for the platform to be mobile-friendly.

Regardless of the platform used to administer the survey, respondents prefer to have the questions numbered so they can refer to them when making comments, etc., and they would like to know approximately how long the survey will take to complete before they begin.

PARTICIPANT QUESTIONNAIRE

Guidance for organizations administering this questionnaire

The purpose of the participant questionnaire is to obtain participants' assessments of the key features of the public or patient engagement (PPE) initiative.

Two versions of the participant questionnaire are available:

Module A. One-time engagement questionnaire²: This survey is intended for one-time engagement activities (e.g., single meetings and events). Prior to implementing this survey, review the questions to ensure they are a good fit with your activity.

Module B. On-going/long-term engagement questionnaire: This survey is intended for on-going or longer-term engagement activities (e.g., planning committees, patient and family advisory committees, etc.). Prior to implementing this survey, review the questions to ensure they are a good fit with your on-going activity.

Who should complete this questionnaire?

Those who are participating in the engagement initiative should complete this questionnaire – this may include citizens, community members, patient/family partners or advisors, or organization staff members.

When should the questionnaires be administered?

One-time engagement activity (Module A):

- For single-day engagement events or activities you may want to carry out the evaluation directly following the engagement activity before participants leave to ensure a high response rate.
- It can also be helpful to provide participants with some time to reflect on the engagement activity before they complete the questionnaire. If you have participants' contact information, consider sending the questionnaire out within 1 to 3 days of the event.

On-going/long-term activities (Module B):

- Each organization will need to determine the most appropriate time to use this questionnaire. Some groups may want to distribute the questionnaire after every meeting/interaction whereas others may want to use it as part of a semi-annual or annual evaluation.
- If you decide to use the tool less frequently (e.g., not after every meeting), it is most appropriate to wait until respondents have a good understanding about their roles and responsibilities and the desired outcomes for the initiative they are contributing to before the evaluation is initiated.

² *These questionnaires are designed to evaluate initiatives that actively engage participants. Simple knowledge exchange activities (e.g., conferences, health fairs) are not appropriate for this tool.*

How do we need to personalize the questionnaire before beginning?

- Find all instances of *[insert name of engagement initiative]* in the questionnaire and replace this text with the title of the work you're evaluating and replace *[organization]* with your organization's name
- Personalize Q16 (Module A) and Q17 (Module B) to fit your organization's needs. The question reads: *As a result of my participation in [insert name of engagement initiative], I am better informed about [administering organization to insert relevant term here, e.g., PPE issue, organization, health system, other topic of focus]*
- Add a contact name and email to the statement: *Thank you for your participation. If you would like to connect with a member of the organization to discuss your experience with this activity further, please contact [NAME, EMAIL]*
- Module A only:
 - If your activity is not group based (e.g., you are working with a single patient advisor on a project), remove questions 9 and 10

Should we use the optional demographic questions?

Appendix 1 includes a set of optional socio-demographic and biographical questions that may be useful to include as part of the evaluation. Including these questions may be helpful 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. When determining if these questions should be included or not, be aware of how they will be perceived by your respondents. If you have a very small group or individuals could be easily identified based on their demographics, consider leaving the questions out. Also, if you have already collected the information in another way previously these may not be needed. If you elect to use these questions, consider separating them from the rest of the questionnaire to re-iterate that confidentiality will be maintained and include clear instructions outlining why this information is being collected and how it will be used.

If you are evaluating an on-going engagement activity, you do not need to use the demographic questions every time you implement the questionnaire.

MODULE A. ONE-TIME ENGAGEMENT ACTIVITIES

We are interested in your feedback about your participation in [insert name of engagement initiative]. The questionnaire includes 21 statements or questions – some questions ask you to rate your level of agreement in response to a statement and others ask for you to provide your comments and feedback. You are encouraged to share your experiences and any information you feel is relevant and will help us to improve our engagement processes.

We appreciate your feedback. It is critical to helping us improve our engagement processes. Please be aware that all of the information you provide will be confidential. Should you have any questions about this questionnaire, please contact [name] at [phone] or [email].

Thank you for your participation!

BACKGROUND INFORMATION

1. What perspective did you bring to [insert name of engagement initiative]?

- Patient/patient advisor/patient partner
- Family member/caregiver
- Staff member
- Community member
- Community partner
- Other, please specify: _____

2. How long have you been working with [organization] as an employee or patient/family/community advisor?

- Less than 6 months
- 6 – 12 months
- 1 – 2 years
- 3 – 4 years
- 5 years or more

PART A. COMMUNICATION AND SUPPORTS FOR PARTICIPATION

Please indicate your level of agreement with each of the statements below.

3. I had a clear understanding of the purpose of [insert name of engagement initiative].

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

4. The supports I needed to participate were available (e.g., travel, childcare, etc.)

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

5. I had enough information to contribute to the topic being discussed

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

6. What else would you like us to know about how your participation in [insert name of engagement initiative] was supported?

PART B. SHARING YOUR VIEWS AND PERSPECTIVES

7. I was able to express my views freely.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

8. I feel that my views were heard.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

9. A wide range of views on the topics discussed was shared.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

10. The individuals participating in [insert name of engagement initiative] represented a broad range of perspectives on the topic.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

11. What else would you like us to know about how you were able to share your views?

PART C. IMPACTS AND INFLUENCE OF THE ENGAGEMENT INITIATIVE

12. I think that [insert name of engagement initiative] achieved its objectives.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. I am confident the input provided through this initiative will be used by [organization]

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. I think the input provided through this activity will make a difference to the work of the organization.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15. What else would you like us to know about the influence you think [insert name of engagement initiative] will have?

PART D. FINAL THOUGHTS

16. As a result of my participation in [insert name of engagement initiative], I am better informed about [administering organization to insert relevant term here, e.g., PPE issue, organization, health system, other focus].

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. Overall, I was satisfied with this engagement initiative.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18. This engagement initiative was a good use of my time.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

19. What were the strengths of [insert name of engagement initiative]?

20. What could be improved about [insert name of engagement initiative]?

21. What else would you like us to know about your experience with [insert name of the engagement initiative]?

Thank you for your participation. If you would like to connect with a member of the organization to discuss your experience with this activity further, please contact [Name, email]

MODULE B. ON-GOING/LONG-TERM ENGAGEMENT INITIATIVES

We are interested in your feedback about your participation in [insert name of engagement initiative].

This survey includes 22 questions – some questions ask you to rate your level of agreement in response to a statement and others ask for you to provide your comments and feedback. You are encouraged to share your experiences and any information you feel is relevant and will help us to improve our engagement processes.

We appreciate your feedback. It is critical to helping us improve our engagement processes. Please be aware that all of the information you provide will be confidential. Should you have any questions about this questionnaire, please contact [name] at [phone] or [email].

Thank you for your participation!

BACKGROUND INFORMATION

1. What perspective do you bring to [insert name of engagement initiative]?

Patient/patient advisor/patient partner

Family member/caregiver

Staff member

Community member

Community partner

Other, please specify: _____

2. How long have you been working with [organization] as an employee or patient/family/community advisor?

Less than 6 months

6 – 12 months

1 – 2 years

3 – 4 years

5 years or more

PART A. COMMUNICATION AND SUPPORTS FOR PARTICIPATION

Please indicate your level of agreement with each of the statements below.

3. I have a clear understanding of the purpose of [insert name of engagement initiative].

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

4. The supports I need to participate in [insert name of engagement initiative] are available (e.g., travel, childcare)

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

5. I have enough information to be able to carry out my role.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

6. What else would you like us to know about how your participation in [insert name of engagement initiative] is supported?

PART B. SHARING YOUR VIEWS AND PERSPECTIVES

7. I am able to express my views freely.

Strongly disagree

Disagree

Neither agree
nor disagree

Agree

Strongly agree

8. I feel that my views are heard.

Strongly disagree

Disagree

Neither agree
nor disagree

Agree

Strongly agree

9. A wide range of views on discussion topics is shared.

Strongly disagree

Disagree

Neither agree
nor disagree

Agree

Strongly agree

10. The individuals participating in [insert name of engagement initiative] represent a broad range of perspectives.

Strongly disagree

Disagree

Neither agree
nor disagree

Agree

Strongly agree

11. What else would you like us to know about how you are able to share your views?

PART C. IMPACTS AND INFLUENCE OF THE ENGAGEMENT INITIATIVE

12. This [insert name of engagement initiative] is achieving its stated objectives.

Strongly disagree

Disagree

Neither agree
nor disagree

Agree

Strongly agree

13. I am confident that [organization] takes the feedback provided by [insert name of engagement activity/process/initiative] into consideration.

Strongly disagree

Disagree

Neither agree
nor disagree

Agree

Strongly agree

14. I think that the work of [insert name of engagement initiative] makes a difference to the work of the organization.

Strongly disagree

Disagree

Neither agree
nor disagree

Agree

Strongly agree

15. In your role, what influence do you think you have had to date?

16. What else would you like us to know about the influence you think [insert name of engagement initiative] has had?

PART D. FINAL THOUGHTS

17. As a result of my participation in [insert name of engagement initiative], I am better informed about [administering organization to insert relevant term here, e.g., PPE issue, organization, health system, other topic of focus]

Strongly disagree

Disagree

Neither agree
nor disagree

Agree

Strongly agree

18. Overall, I am satisfied with this engagement initiative.

Strongly disagree

Disagree

Neither agree
nor disagree

Agree

Strongly agree

19. This engagement initiative is a good use of my time

Strongly disagree

Disagree

Neither agree
nor disagree

Agree

Strongly agree

20. What are the strengths of [insert name of the engagement initiative]?

21. What could be improved about [insert name of the engagement initiative]?

22. What else would you like us to know about your experience with [insert name of the engagement initiative]?

Thank you for your participation. If you would like to connect with a member of the organization to discuss your experience with this activity further, please contact [NAME, email].

APPENDIX 1: OPTIONAL DEMOGRAPHIC QUESTIONS

Finally, we would like ask a few questions about you. The purpose of collecting this information is to gain a deeper understanding of your background so we can understand how well we have done in engaging relevant individuals and communities in our engagement initiatives. Please note that all responses are confidential, and we value all individuals' contributions to this work. You may skip any question you would prefer not to answer.

1. What year were you born? _____

2. What is your sex?

Male

Female

Other: _____

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

Visible minority

Persons with disabilities

Indigenous people of Canada

Recent immigrant to Canada

LGBTQ community

Other: _____

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

No schooling

Some or completed elementary school

Some high school

Completed high school

Some post-secondary (college, university, technical training) education

Completed college

Completed technical training (e.g., Apprenticeship)

Completed University

Completed post graduate, professional or graduate degree

Note: some people may have completed multiple types of education. If this applies to you, please select the highest level of education that you have achieved.

5. What is your current work status?

Working for pay part time (including retired part time, homemaker part time)

Working for pay on a casual or on-call basis

Not in labour force, able to work

Not in labour force, unable to work

Retired

Student (includes students working part time)

Homemaker

Have you ever worked for pay in a healthcare profession?

Yes

Note: We are interested in paid experience in health care due to the health focus of this work.

No

PROJECT QUESTIONNAIRE

Guidance for organizations administering this questionnaire

The purpose of the project questionnaire is to review and assess the planning, execution and impact of public and patient engagement component of specific projects that are being carried out within your organization (e.g., quality improvement, planning and design, etc.). The tool has been split into three distinct modules:

- Module A. Planning the engagement component of your project
- Module B. Assessing the engagement component of your project
- Module C. Assessing the impact of the engagement component of your project

To fully evaluate the engagement component of the project, each of the three modules should be used.

While the questionnaire serves as an evaluation tool, it can also be used to assist with the planning of evaluation activities, acting as a type of checklist to follow as you design your activities to confirm you're considering the key components of evaluation in your work.

Who should complete this questionnaire?

The individuals in the organization who have requested or sponsored the engagement component of the project or those responsible for its planning and execution should complete the questionnaire.

In organizations where there is an engagement team it may be that different people need to complete each section.

The questionnaire can also serve as a guide for a debriefing conversation with staff. You may want to use the tool as an interview guide and complete the questions together.

When should the questionnaires be administered?

- **Module A** is designed to help ensure you're on the right track with your engagement. This should be completed during the planning and implementation processes and serves as a type of checklist so you can be sure that you're fully considering important components of successful engagement.
- **Module B** should be completed immediately following the engagement component of your project. This module is designed to help you review the engagement that has just taken place to understand what worked well, and what could be improved for future engagements.
- **Module C** should be completed 3 – 6 months after the engagement component of your project is complete. The purpose of this module is to assess the impact of your engagement work. We suggest waiting 3 – 6 months to complete this module so you have time to see the impacts of your engagement, as these may not be immediate.

How do we need to personalize the questionnaire before beginning?

- Find all instances of *[insert name of engagement initiative]* in the questionnaire and replace this text with the title of the work you're evaluating

MODULE A. PLANNING THE ENGAGEMENT COMPONENT OF YOUR PROJECT

We are interested in your feedback about the planning of the engagement component associated with [insert name of the project that the engagement component supported].

This is the first of three modules to evaluate the engagement component of your project. Two additional modules should be completed following the completion of the project. This module is designed to help ensure you’re on the right track and should be completed during the planning and implementation process; it can serve as a planning checklist so you can feel confident that you’re considering the key elements of successful engagement.

The questionnaire includes 15 questions – some questions ask you to rate your level of agreement in response to a statement and others ask for you to provide your comments and feedback. You are encouraged to share your experiences and any information you feel is relevant. Remember, this is a tool to help improve your engagement work. Identifying challenges is an important part of that process.

BACKGROUND INFORMATION

1. Please describe your role in the engagement component associated with this project (e.g., project lead, engagement lead, etc.)

2. Please specify who is most directly affected by the outputs of this project (e.g., patients with arthritis, youth with mental health problems, residents of a particular neighbourhood, etc.)

PART A. INTEGRITY OF DESIGN AND PROCESS

3. The engagement plan for the project includes a clear statement of the objectives for the engagement.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. The engagement plan has a clear strategy to recruit those most affected by the outputs of this project (e.g., relevant lived experience, socio-demographic or geographic communities).

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. The engagement plan has a clear strategy to engage individuals and groups who will adequately reflect the perspectives of those who will be most affected by the outputs of this project.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. The engagement plan provides clear documentation of how the financial, logistical, and information needs of participants (e.g., travel, dietary, interpretive, childcare) will be accommodated.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. The engagement plan includes a clear statement about how the outputs generated from the engagement will be shared with participants.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. The engagement plan has clearly described strategies for communicating with participants.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Plans are in place for how the PPE input will be used in the organization.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. A clearly described process for communicating with participants about how PPE input will be used is in place.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PART B. COLLABORATION, COMMON PURPOSE AND PARTNERSHIPS

11. Do you plan to work with other organizations as part of the engagement component of this project?

Yes → Please list the organizations you plan to work with:

No → Skip to part C (Q14)

12. We are identifying shared goals for the engagement component with these organization(s).

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. We have set a plan for how we will achieve these shared goals through the engagement component.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PART C. FINAL REFLECTIONS

14. Overall, I am satisfied with the planning phase of the engagement component.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15. I feel confident in my abilities to plan and execute the engagement activities associated with this project.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MODULE B. ASSESSING THE ENGAGEMENT COMPONENT OF YOUR PROJECT

We are interested in your feedback about the public and patient engagement (PPE) component of [insert name of engagement initiative].

This is the second of three modules to evaluate this PPE component. This module should be completed immediately following the completion of the engagement component of your project. It is designed to help you review the PPE component that has just taken place to understand what worked well, and what could be improved. If your PPE component is a reoccurring activity (e.g., an advisory council) you may wish to consider completing this module on a more regular basis, for example after each meeting. The final module (Module C) should be completed in 3 – 6 months to review the impact of the engagement associated with this project.

The questionnaire includes 16 questions – some questions ask you to rate your level of agreement in response to a statement and others ask for you to provide your comments and feedback. You are encouraged to share your experiences and any information you feel is relevant. Remember, this is a tool to help improve your PPE work. Identifying challenges is an important part of that process.

PART A. INTEGRITY OF DESIGN AND PROCESS

1. The perspectives of those who will be most affected by the outputs of this project were reflected through those who participated in the engagement.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

2. The financial, logistical and information needs of participants (e.g., travel, dietary, interpretive, childcare, etc.) were accommodated.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

3. Adequate time was allocated to plan and implement the engagement component.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

4. The goals for the engagement component were shared with participants.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

6. Participants were told how the input from the engagement component would be used by the organization.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

PART B. INFLUENCE AND IMPACT

7. Was a summary report of the engagement component of the project prepared?

Yes

No → Skip to part C (10)

8. Who was the report shared with? (Please select all that apply)

Individuals who participated in the engagement activity

Management within your organization

Board members

Partners

Others, please specify:

9. Please select from the following list how the engagement input was shared with relevant individuals and/or groups within or outside the organization.

Written reports were made available to interested individuals

Presentations, briefings to individuals or groups

Informal communications strategies (e.g., emails, phone conversations)

Other strategies were used. Please describe these below:



We did not share the engagement input → Why was the input not shared with others?

PART C. COLLABORATION, COMMON PURPOSE AND PARTNERSHIPS

10. We worked with other organizations as part of the engagement component of this activity.

- No → Skip to Part D (Q13)
- Yes → Please list the organizations you worked with below.

11. We were able to identify shared goals with our partners through this process.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. Do you plan to collaborate with these partners again in the future?

- No
- Yes → Please describe your plans below.

PART D. FINAL REFLECTIONS

13. Overall, I was satisfied with the engagement component of this project.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

14. The engagement component added value to the project it supported.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

15. As a result of my involvement in the engagement component associated with this project, I will be comfortable leading future engagement activities.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

16. I would like to participate in PPE training to build my capacity to do more of this work.

No

Yes → what PPE-related skills would you be interested in developing?

MODULE C. ASSESSING THE IMPACT OF THE ENGAGEMENT COMPONENT OF YOUR PROJECT

We are interested in your feedback about the impact of the public and patient engagement (PPE) component of [insert name of the project that the engagement component supported].

This is the last of three modules to evaluate the engagement component of your project. This module should be completed 3 – 6 months after the engagement component of your project has been completed to provide adequate time to assess tangible impacts.

The questionnaire includes 8 questions – some questions ask you to rate your level of agreement in response to a statement and others ask for you to provide your comments and feedback. You are encouraged to share your experiences and any information you feel is relevant. Remember, this is a tool to help improve your PPE work. Identifying challenges is an important part of that process.

1. Please describe the ways in which the public, patients and/or caregivers influenced the project through their engagement and to what extent.

Type of influence	Amount of Influence				
	None	Small amount	Moderate amount	A lot	Not sure

2. The output generated from the engagement component associated with this project was considered by those in a position to act on it.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

3. Please describe how the contributions from the engagement component were considered by those in a position to act on them.

4. The output generated from the engagement component associated with this project influenced the project's outcomes.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Please describe how the output from the engagement component associated with this project influenced the project's outcomes.

6. Overall, I was satisfied with the engagement component of [insert name of project that the engagement component supported].

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. The engagement component was a good use of our program resources.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Please provide any additional feedback regarding the influence that the engagement component of this project has had on you, your work, or your organization as a whole.

ORGANIZATION QUESTIONNAIRE

Guidance for organizations administering this questionnaire

The purpose of this questionnaire is to assess how engagement, as an organizational activity and responsibility, is being carried out within organizations. Results from this questionnaire will be useful for tracking trends over time, to document organizational improvements in PPE, and to perform annual audits.

Note: If you want to evaluate a specific engagement activity from the perspective of the engagement participants or staff, the participant and project questionnaires will be a better fit.

Who should complete this questionnaire?

The questionnaire is aimed at individuals who have a general awareness of how engagement works in the organization or in their particular area (e.g., department, program, etc.) and can provide informed responses to the questions being asked. These could be Board members, the executive team, department leads, managers, senior project leads and/or project sponsors, and organization partners. The questionnaire could also be administered to public or patient partners who have had a long-standing affiliation with the organization but some of the questions would need to be modified for this purpose (e.g., not explicitly geared towards staff employed by the organization).

When should this questionnaire be administered?

It is important for organizations to consider the timing of evaluation. Ideally this questionnaire should be completed once your organization has been implementing PPE initiatives with some regularity and on an annual or semi-annual basis so that enough time has passed to be able to track changes over time in your PPE work.

How do we need to personalize the questionnaire before beginning?

- The participant introduction to the survey should be personalized to include your organization's name and how your organization defines public and patient engagement.
- If you are implementing this survey across your organization, you may want to ask which team/program/department the respondent works in to allow you to assess any potential differences between segments of your organization.

ORGANIZATION QUESTIONNAIRE

We are interested in your views about the public and patient engagement (PPE) policies and processes in [insert organization or department name]. Within our organization, we define public and patient engagement as [insert definition].

As you are responding to the questions below, try to think about how the organizational requirements for public and patient engagement influence your work. Remember, the focus is not on the evaluation of any single engagement initiative but to understand how engagement is carried out more broadly across the organization or within a particular program or department.

The questionnaire includes 30 statements and questions. 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 for your participation!

BACKGROUND QUESTIONS

1. What is your role in the organization?

- Board Member
- Staff
- Mid-level manager
- Senior manager
- Other, please specify:

2. How would you rate your level of awareness of the organization's overall approach to public and patient engagement?

Completely
unaware

Low level of
awareness

Neither aware nor
unaware

Some level of
awareness

High level of
awareness

3. How often do you interact with public and/or patient advisors working with the organization?

Not at all	Infrequently	Sometimes	Fairly frequently	Very frequently
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. At what stage would you say your organization is when it comes to routinely engaging the public and/or patients in its activities?

Not yet started	Just beginning	Established/making some progress	Well established
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PART A. POLICIES AND PRACTICES THAT SUPPORT PUBLIC AND PATIENT ENGAGEMENT (PPE)

5. The organization has an explicit strategy or framework for public and patient engagement (PPE) that guides its activities in this area.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. The organization has explicit strategies for recruiting public and patient participants, advisors or partners, depending on the engagement initiative.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. There are clearly identified resources allocated to PPE within the organization.

Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. The resources that are available for PPE are adequate

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

Don't know

9. The organization prepares reports that summarize the contributions from PPE initiatives.

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

Don't know

10. Please use the following space to expand on your answers to the questions in this section, if you would like to do so.

PART B. PARTICIPATORY CULTURE

11. A commitment to PPE values and principles is found in key organizational documents (e.g., mission and vision, strategy, etc.)

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

Don't know

12. A commitment to PPE values and principles is demonstrated through the structure of the organization (e.g., dedicated PPE leadership positions)

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

Don't know

13. The organization has formal collaborations with other organizations that have a strong PPE focus (e.g., provincial/national/international organizations)

- Yes → which organizations? _____

- No
- Don't know

14. Responsibilities related to PPE are clearly articulated in the job descriptions of staff who are leading and supporting these activities.

- | | | | | | |
|--------------------------|--------------------------|----------------------------|--------------------------|--------------------------|--------------------------|
| Strongly disagree | Disagree | Neither agree nor disagree | Agree | Strongly agree | Don't know |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

15. Comprehensive PPE training and materials are available to support staff who are leading and supporting these activities.

- | | | | | | |
|--------------------------|--------------------------|----------------------------|--------------------------|--------------------------|--------------------------|
| Strongly disagree | Disagree | Neither agree nor disagree | Agree | Strongly agree | Don't know |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

16. I have adequate training in PPE to support my role.

- | | | | | | |
|--------------------------|--------------------------|----------------------------|--------------------------|--------------------------|--------------------------|
| Strongly disagree | Disagree | Neither agree nor disagree | Agree | Strongly agree | Don't know |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

17. Organizational leaders demonstrate their commitment to incorporating the input provided by public and/or patient partners in identifiable ways.

- | | | | | | |
|--------------------------|--------------------------|----------------------------|--------------------------|--------------------------|--------------------------|
| Strongly disagree | Disagree | Neither agree nor disagree | Agree | Strongly agree | Don't know |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

18. Reports summarizing the contributions from PPE initiatives are shared with engagement participants and key stakeholders.

- | | | | | | |
|-------------------|----------|----------------------------|-------|----------------|------------|
| Strongly disagree | Disagree | Neither agree nor disagree | Agree | Strongly agree | Don't know |
|-------------------|----------|----------------------------|-------|----------------|------------|

19. Please use the following space to expand on your answers to the questions in this section, if you would like to do so.

PART C. INFLUENCE AND IMPACT

Please note, the rating scale has changed in this section

20. The contributions that public and patient participants, partners and advisors are making to the organization are identifiable.

Never

Rarely

Some of the time

All of the time

Don't know

21. Organizational [or department] leaders use the input generated from PPE initiatives.

Never

Rarely

Some of the time

All of the time

Don't know

22. I can think of instances where the input generated from PPE initiatives has influenced decisions within this organization [or department].

Never

Rarely

Some of the time

All of the time

Don't know

23. I can think of instances where the input generated from PPE initiatives has influenced relevant governance decisions (i.e., at the Board level).

Never

Rarely

Some of the time

All of the time

Don't know

24. Please use the following space to expand on your answers to the questions in this section, if you would like to do so.

PART D. COLLABORATION AND COMMON PURPOSE

25. As a result of our PPE work, the organization has identified shared goals with other groups (e.g., public, funders, community organizations, government departments).

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

Don't know

26. As a result of our PPE work, the organization has developed collaborative relationships with other groups (e.g., public, funders, community organizations, government departments)

Strongly disagree

Disagree

Neither agree nor disagree

Agree

Strongly agree

Don't know

27. Please use the following space to expand on your answers to the questions in this section, if you would like to do so.

PART E. FINAL THOUGHTS

28. Overall, I believe the organization has an appropriate level of engagement activity.

Strongly disagree

Disagree

Neither agree nor
disagree

Agree

Strongly agree

29. Overall, I believe this organization devotes an appropriate level of resources to support its engagement initiatives.

Strongly disagree

Disagree

Neither agree nor
disagree

Agree

Strongly agree

30. Please share any additional reflections about PPE within your organization, if you would like to do so.
