Divisions of Family Practice
A GPSC initiative

Selecting a strategy and associated techniques for Engagement

The selection of an engagement strategy is dependent on a number of complex, interrelated factors:

- ☐ Choose techniques that best match your participation process objectives and stakeholders
- ☐ Is the approach to involvement tailored to meet the goal and phase of policy making?
- ☐ Level of influence with the participant expectations
- ☐ Nature and complexity of issues acknowledged and integrated
- ☐ Participant profiles considered (eg. mix of citizen vs group reps)
- ☐ Previous experience of organizers with various techniques
- ☐ Level of concern and media attention around the issues
- ☐ Realistic timelines to accomplish meaningful engagement
- ☐ Financial costs known and accounted for
- ☐ Human resources and expertise available (Internal? External? Partners?)
- ☐ Degree of collaboration required (especially across politically charged boundaries)
- ☐ Do you need to diversify participation techniques?
- ☐ Level of support from stakeholders and possible partners
- ☐ Level of political support in department or across organization

- ☐ Choose techniques that best match your participation process objectives and stakeholders.
  **Remember that not every participant wants to participate at every stage or event

When developing the technique/ tool

- ☐ Develop a staged plan for processes (esp. those that are complex)
- ☐ Design specific outreach and inclusion plans
- ☐ Choose convenient venues and locations
- ☐ Use existing networks and structures and respond to invitations to present information and/or consult
- ☐ What are your stated objectives? And what are your "secondary" objectives? How are these built into the tool?

Support required to implement an engagement plan

- ☐ Detailed project schedule
- ☐ Budget (hall rental, refreshments, translation, external facilitation…)
- ☐ Personal roles and responsibilities
- ☐ Logistics (overheads, venues, food, AV needs, flyers, advertising…)
- ☐ Detailed recruitment plan

Physician Engagement Principles

Demonstrating your authentic request: make respect evident

- Bring participants in early in the process
- Enough lead time to be able to participate
- Be aware of their priorities and constraints (eg. changing office coverage)
- Overall process: enough time to engage and gain buy in (broadly)
- Tight time: flex on the start time but tight on when you finish
- Clearly communicated purpose and ask
- Authentic commitment to the relationship
- Really seek to understand…

When Engaging:

Prepare/ plan

- Who will be there? How will this affect what you need to plan for?
- Any things to plan for: specific agendas, deep skepticism; old history that may “stop” the conversation
- Participation: voluntary vs. mandated … and individual vs. representative
- Make sure all who want to be there have the full information about when, where and how to prepare for the meeting… well in advance of the session

Participation:

- Does the room/ space that you have chosen “fit” the tone you want to set and the outcome you are trying to achieve? If you want to foster dialogue then make certain that you are in a place that is not too noisy, has good acoustics, has warm and friendly atmosphere.
- Are there any materials that you need to produce in the room or to be circulated before, that will help people to participate “fully”? E.g. Reports, graphs, overviews, discussion papers, diagrams.

Setting the tone

- If you anticipate old history to arise, or challenges to the process, or certain strong agendas, set a “new” tone
- Acknowledge the history
- Create more constructive parameters up front… it is hard to do after people have become really negative and have an audience.

- Ensure they understand the commitment for broad participation and that you are attempting to "share the air". E.g. that you want to hear from everyone, not just the loudest and most comfortable speakers.

Examples of "ground rules" or things you can ask participants to be mindful of…

- Be curious
- Seek to understand
- Share the air

Start on time. End on time.

Respect their time … both if they make the effort to be there on time, and the fact that they may need to be somewhere afterwards.

Know the purpose of the meeting. Communicate this.

- Purpose/ scope/ outcome
- What will happen with their input/ contributions?

Objectives clearly defined: width vs. depth

- Width: brainstorm vs. how to stay away going down the rabbit hole/ driving to solutions
- Depth: seek to understand the nuances of the issue you are exploring. E.g. "What would that look like" "what would success look like"?

In the meeting

- Acknowledge peoples contributions and participation
- Capture their thoughts (document it IN the meeting)
- Refrain from being the most prominent voice
- Clarify/ seek to really understand THEIR contributions
  - design of the engagement to match prevalent styles in the room (diagnose and treat)
- Active and informed participation
- "Tools": background or in the room information
  - Clear, concise, comprehendible
- KEEP THE JARGON OUT
- Check your assumptions: are they familiar with the system they work in?

Follow up: link back to the participants

- Next steps: another engagement? Input will go somewhere?
- Notes from the meeting sent out to participants
- Update: tell them where their information went and what has happened