

Sample Methods or Techniques for Engagement

There is no one 'correct' engagement method for a given project. The method(s) should be appropriate for the unique barriers and motivation to participate faced by your population(s) of interest and for the type of input you need. Moreover, multiple methods can be used to all feed into the same process (e.g., one could "consult" by conducting surveys for those who have access to the Internet as well as interviews with those who do not and feed the patient input for both methods into program planning). The following is a list of methods that are commonly used for engaging patients.

Note that this is not an exhaustive list of all engagement methods, and some of these methods can be combined.²



² Adapted from:

1. International Association for Public Participation (2006). IAP2's Public participation spectrum (pp. 4). In Planning for effective public participation: Student manual. Thornton, CO: International Association for Public Participation.
2. Fraser Health. Patient Engagement Heard and Valued: A handbook for meaningful engagement of patients that have not traditionally been heard in healthcare planning. Retrieved from: http://www.cfhi-fcass.ca/sf-docs/default-source/patient-engagement/awesome_handbook-fraserhealth.pdf?sfvrsn=2
3. City of Waterloo. Public Involvement: Guidelines, tools, and worksheets for successful community engagement. Retrieved from: http://www.waterloo.ca/en/contentresources/resources/government/public_engagement_guidelines.pdf
4. The Health Canada Policy Toolkit for Public Involvement in Decision Making. Corporate Consultation Secretariat, Health Policy and Communications Branch (2000). http://www.hc-sc.gc.ca/ahc-asc/pubs/_public-consult/2000decision/index-eng.php#a79

Empower	What	Why	When	Who
Citizen Juries	A process that gathers a randomly selected and demographically diverse panel of citizens for 3 to 5 days to carefully examine a complex issue. The Jury makes recommendations to the decision makers and to the public.	Complement, or build upon earlier, more conventional forms of engagement. Involve citizens in a high-quality discussion of a key issue. Help decision makers know what most people would support if they had balanced, comprehensive, information and the chance to think about it with fellow citizens	To involve citizens in a high-quality dialogue about a key Issue. To involve citizens in developing a thoughtful, well informed solution to a public problem or issue	Involves decision makers in order to legitimize and support the process and later report on actions taken as a result of the advice of the jury; a stakeholder steering committee to ensure fairness of process; randomly selected small group of individuals (jury); media to publicize process and provide commentary; community can participate as observers.
Think Tanks	Think tanks bring together creative thinkers to develop innovative solutions to current issues and problems. Although most often used for public policy and planning, think tanks have become a common technique when creative solutions and out-of-the-box thinking are needed in non-governmental organizations and private-sector organizations.	A think tank is a useful technique when: <ul style="list-style-type: none"> ✓ innovative solutions are needed for public policy problems ✓ issues are complex and interdependent ✓ current solutions no longer work and different thinking is needed ✓ there are scholars and thinkers with both insight and expertise to assist government in improving public policies and programs. 	Think tanks usually run for a relatively short period of time (e.g. half a day to three days), depending on the topic and desired outcome.	Participants are selected for their knowledge and expertise, creativity, ability to synthesize and analyze information, and prepare cogent recommendations.
Study Groups	A study group consists of a series of structured and non-structured discussions which take place over a period of time. These discussions can take place through: face-to-face meetings, teleconferences or the use of electronic links.	The process is used to share ideas and opinions on issue areas and to provide advice on direction setting to decision makers. Issue areas include (but are not limited to) the social, ethical, political, economic and scientific fields.	Study groups can be assembled quite quickly. This is especially the case if key participants have already been identified and if the circle is convening locally for an initial, face-to-face meeting.	A study group can be made up of approximately five to 12 people. Participants are selected for their knowledge in a particular area.

Collaborate (continued)	What	Why	When	Who
Retreat	A retreat is a meeting convened in a relaxing and supportive environment, often in a natural or rural setting. Participants stay together at the retreat with opportunities for recreational and social activities encouraged within the meeting schedule.	A retreat is a useful technique when: the current environment is too full of distractions; the process is as important as the end product (i.e. people need to feel they contributed to the product and agree to act on the results); there is a need/desire to strengthen the interpersonal relationships and build stronger teams; there is a need to establish different norms of behaviour (i.e. the way people treat each other in the work environment); a "captive audience" is the best way to complete the desired outcomes.	Sufficient time is necessary to plan and organize the retreat. They are most often organized and held once or twice a year. They usually last between one-half a day to three days.	All interested stakeholders; key decision makers
Charrette	An intense brainstorming and decision-making process that brings together all the essential stakeholders for a prolonged meeting or series of meetings in an attempt to generate a broad range of options, criteria for decision making, and a final decision while all decision makers are present.	Promotes the organization's openness to suggestions; generates creative, alternative solutions to problems; facilitates collaborative design.	A minimum of four hours for a modest issue ranging to several days for a complex issue.	All interested stakeholders; key decision makers attend as observers and information resources; project staff could attend as resources; a lead facilitator oversees the event.

Collaborate	What	Why	When	Who
Planning Workshops	These are joint working sessions attended by representatives of all participant groups.	A workshop ensures that the parameters of the project are agreed upon by the public as well as the staff.	They should be established early in the process and have a role to play throughout. Consult to determine a central location and time – decided at general meetings. Location and facility must be accessible and convenient to the majority of participants.	Delegated representatives of all interested groups and participating agencies. During informal, preliminary meetings, ask each group to identify a rep or alternatives to attend subsequent meetings and workshops.
Citizen Advisory Committees	An advisory committee, board or council consisting of a group of representatives from a particular community or set of interests, appointed or selected by government bodies to provide comments and advice on an issue. An advisory committee is asked to host and participate in public meetings and conferences. Also, it is expected to provide a sounding board to adequately reflect public opinion and to organize and coordinate the involvement and input of a wide range of people.	Advisory committees, boards or councils are used to: consult the public on the planning and implementation of a project or policy; develop consensus for action on complex issues that have a broad impact on the community; facilitate frequent contact between the community and the consulting agency or the agency sponsoring the consultation; encourage the sharing of information and the negotiating of strategies and solutions; provide two-way communication with a number of interested parties; gain expertise and input from a number of interested groups; review technical data or other material, assist in educating the public; resolve conflict between groups.	Often, the advisory committee members are appointed to terms of one to two years, although shorter terms could be adequate, depending on the particular issue or reform.	A group of representatives from a particular community or set of interests

Involve	What	Why	When	Who
Public advisory groups	This is a formal group or committee established to provide direct comment to the municipality. It may be integrated into the process so that separate meetings of the public and municipal participants are not necessary.	A public advisory group is created so that there is consistent public involvement on the project or initiative.	A group should be formed before the terms of reference for the project are developed.	Members are representatives of all values or interests in the project or initiative. They should have endorsement from the people and interests they represent.
Working Groups	Working groups bring together selected people with a range of perspectives on a topic	They are established to discuss and assess general issues of importance, determine priorities and establish preferences for general procedures and terms of reference. Also, working groups are set up to address technical issues such as information gathering and analysis.	A working group should be established early in the process as part of the design stage. In the later stages, a working group consisting of public interest and municipal representatives concerned with a particular aspect of a project may also be formed.	A working group should be small and informal, ideally with not more than ten people. It should bring together a cross-section of perspectives. Representatives from official interest group positions are not desired at such sessions. The facilitator or chair must be perceived as neutral.
Workshops	A public forum which participants work together on prescribed assignments or exercises to provide specific input to the process.	Encourage public to share perspectives and work together toward result. Foster discussion Surface new ideas and creative problem solving. Get participants engaged in the project and in finding workable, sustainable decisions.	A single session would run at least 2-3 hours and may last up to a full day.	Generally open to the public; may request that participants sign up in advance.
World Café	A meeting process featuring a series of simultaneous conversations in response to predetermined questions. Participants change tables during the process and focus on identifying common ground in response to each question.	To foster open and meaningful discussion Surface areas of commonality and draw people into common problem solving Removes formal atmosphere Gain a high quantity of responses in short amount of time Builds community among diverse participants.	A single world café usually best conducted in 2 - 3 hours.	May be used for an open forum or a group of invited participants.

Consult	What	Why	When	Who
Focus Groups	Focus groups are group interviews. Used as a one-time, highly facilitated meeting with a small group of people to discuss one topic.	Focus groups are less intimidating than big meetings. To generate dialogue about an issue in a small forum.	Provide information and ask questions to key stakeholders. Typically 1 - 2 hours.	A small group of individuals selected to represent either a stakeholder perspective or the diversity within a given population.
Surveys	Random sampling of population, often by telephone or email to gain statistically valid specific information.	Gain perspectives from people unlikely to participate otherwise. Gather input from a cross-section of the public. Obtain a higher rate of response than some other forms of communication.	Before or after a project	A cross section of the population, usually randomly selected.
Public Meetings	Public meetings are normally sessions at which there are both registered and unregistered presentations. This format can result in conflict if the assessment of public opinion on any given topic/issue is not accurate, and that public meetings are not appropriate if an initiative has a significant amount of tension among interests.	They present opportunities for the public to hear and make comment on initiatives. Public groups, municipal representatives and the general public are encouraged to attend, listen, raise questions and make presentations to the chair, panel or facilitator.	Public meetings should be well advertised and should normally occur either in the early stages of the process or in the latter stages of a process when a consensus or direction or range of options has been proposed.	Public meetings should be open to the general public. They should be advertised appropriately so that a broad number of people will be aware of the opportunity. Formal presentations should occupy no more than 30 minutes, followed by comments or registered presenters from the public, with a maximum of 10 minutes per presentation. The balance of the meeting should be spent hearing the comments and questions from the public.
Polling	Often referred to as public opinion polling, polling is used to gauge public attitudes, values and perceptions on various issues.	The main strengths of a poll is its highly representative nature. Using scientifically developed techniques, samples from polls generate an accurate match of the population. Polls allow issue specificity with immediate feedback.	Public opinion polling can be useful for gauging opinion, obtaining raw data and options from stakeholder or client groups, and for determining the public's level of understanding on certain issues.	General public

Inform	What	Why	When	Who
Pamphlets and Fact Sheets	A small booklet or leaflet containing information about a single subject. It may define an issue or promote discourse and informed debate on a subject. It is an ideal way to inform stakeholders and heighten awareness with a broad overview of an issue, policy or program.	Topic description; information to educate, promote, or instruct. The fact sheets are disseminated to the public and the media either on a proactive or reactive basis in order to answer some of the most frequently asked questions on an issue.	Ongoing New policies or programs. A fact sheet is most useful as a strategic compilation of key information sources on an issue for the public.	General public
Web Sites/ Internet	Electronically based information (like a pamphlet or fact sheet).	Reaches people who won't/can't come to a meeting due to distance, busy schedules, or accessibility.	24 days a week 7 days a week 365 days a year	General public, anyone with computer access and ability (computer literacy). May not reach less-affluent or less educated members of the population.
Expos, Fairs, and Events	A central event with multiple activities that provide information and raise awareness.	Focus attention on one element; attract media; raise awareness on multiple levels.	Usually 3 - 4 hours of time that is designed to be convenient to a variety of attendees.	General public
1-800 numbers/ Telephone Hot Lines	A single telephone number that the public can call to ask questions, make comments, or learn about specific events, free of charge to users.	Offer updated information or general news about a special program or issue. Answer questions from the public. The goal is most often a facilitatory one, enabling institutions and the public to communicate quickly, effectively and inexpensively.	Best established at the start of a project. A 1 800 number is usually developed and maintained in response to a current issue.	Most are set up to be publicized widely for use by general public.
Open House	These are events where information is put on public display and the general public has the opportunity to meet members of the staff team working on the initiative as well as any official public representatives.	Open houses are focused on providing information. While there is opportunity for some dialogue, their primary purpose is to ensure accurate information about the initiative is available to the public.	Since the focus is on information sharing, they should be used early in the process, perhaps in conjunction with public meetings, or during later stages when important information reflecting decisions can be provided. To plan appropriately can require up to two months.	Open to all members of the public and are hosted by the staff team and any public representatives. They should be held in community centres or other locations that are easily accessible to ensure that all community groups and residents are provided with equal opportunities to experience.