Meeting with patient and family partners for the first time

Before working with patient and family partners matched to your engagement, it is important to meet with them. This allows you to clarify your engagement and start building the relationship.

Our partners are people who (mostly) do not work in healthcare. They may not understand how the system operates. To have a successful engagement, you need to create a relationship with clear expectations. This is also your chance to understand what they expect or need from you. For example, if a partner is hard of hearing, they may need specific supports in team meetings.

The first meeting is also your opportunity to acknowledge the perception of power imbalances. It is important to discuss this and reinforce that the partner is an important member of the team.

Setting up the first meeting

The Patient and Family Experience Team will provide you with partners' contact emails.

- Contact the partners and set up a 30-minute introductory call. Cc patientexp@bccancer.bc.ca on the email. If more than one partner is joining your engagement, you can set up a meeting with all of the partners at the same time.
- Meeting virtually (e.g. Zoom or Microsoft Teams) is best so you can see each other but a phone meeting works as well. Make sure to check with the partners that a virtual meeting works for them.
- If you have five or more partners, consider asking a colleague to help you facilitate the meeting. Also, make the meeting 60 minutes.

What to do during the meeting

1. **Introduce yourself**
    a. Provide a meaningful land acknowledgement. Research it, write it down and incorporate it into meetings. (Refer to "Culturally Safe Engagement: What Matters to Indigenous (First Nations, Metis and Inuit) Patient Partners?" to learn more)
    b. Tell the partner(s) about your role at BC Cancer (or the organization you're with) as well as your role in the engagement.
    c. Remember, the partner is not your work colleague. This is a person volunteering their time. Try to be informal but organized. Speak as if you are having a conversation with a friend or relative.
    d. If other team members are at the meeting, they should also introduce themselves.
    e. Do not use acronyms or medical jargon.
2. **Ask partners to introduce themselves**
    a. Ask the partner to tell you why they volunteered for the engagement.
    b. This is your opportunity to get to know a bit about the partner and understand how to communicate with them. Remember, you want to understand their perspective and the influence it will have on the project. Active listening skills are key! We often hear from partners that they share their experience through storytelling. Make space for partners to share their story.

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3. **Talk about your engagement.**
    a. What is the purpose of your engagement? What is the problem you are trying to solve? Speak about it in a way the partner can understand.
        i. For example, if you are redesigning a clinical reception area, be specific about what you are asking. You may be asking the partner how best to organize the seating layout or what kind of music to play so people are comfortable.

    b. What is the partners' role? What exactly will they do? Be specific!

    c. How long do you expect the engagement to run? How much time will the partners need to commit to the engagement?

    d. Who is involved in the engagement, other than yourself?

    e. What influence will the partners have on the engagement?
        i. Be practical and honest. What will you be doing with their input? For example, you will write down their ideas and consider them in your decisions.
        ii. Review the [IAP2 Spectrum of Public Participation] so you can accurately describe the partners' level of influence:

    f. If there are regular engagement meetings already scheduled, confirm partner(s) can attend. If meetings are not scheduled, confirm partner availability so you can work around their schedules.
        i. An alternative is to have a separate touch base with the partners after the meetings to discuss items that could benefit from partner input.
        ii. Ask the partner if they need any support to feel comfortable in the meetings.
        iii. Send meeting agendas and materials with ample time for partners to review and prepare.

    g. Clarify how you will keep in touch with partners and how you will report back on the engagement outcomes.

    h. Ask the partner if they have any questions.

4. **Thank them for their time and outline next steps.**

After the meeting

- Email the partners to thank them for the meeting and confirm they are still interested in participating. Outline next steps and include any documents the partners need to be prepared for the engagement (e.g. Terms of Reference). Cc patientexp@bccancer.bc.ca on the email.

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- If after meeting with the partner, you feel they are not a good fit for your engagement, contact the Patient and Family Experience team at patientexp@bccancer.bc.ca

Resources

- A Guide to Authentic Patient Engagement
- Culturally Safe Engagement: What Matters to Indigenous (First Nations, Metis and Inuit) Patient Partners?
- Tip sheets