

ENGAGEMENT RESOURCE GUIDE



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WELCOME!

ENGAGEMENT RESOURCE GUIDE



This guide is intended to serve as a helpful resource for physicians and other health care stakeholders who are engaging with each other on shared priorities and issues by continuing to strengthen relationships, processes, and structures.

It contains an overview of principles and a basic framework for strong engagement along with an assortment of relevant tools and templates.

Many medical staff associations (MSAs) and divisions of family practice (divisions) have advanced expertise and strategies for engaging with their members that go well beyond this resource guide. This guide includes some of their innovative and creative tools as additional downloadable resources.

As a living document, this guide will be periodically updated with a new tools and references.

If you have a tool to suggest, contact engagement@doctorsofbc.ca.

3 REASONS TO USE THIS GUIDE

1. Understand the term 'engagement'
2. Explore best practices for successful engagement including potential frameworks and tools
3. Access common language with which to communicate, discuss, and reflect on engagement; and challenges and successes related to engagement

ENGAGEMENT: WHAT IS IT, AND WHY DOES IT MATTER?

Engagement is a process for making better decisions that incorporate the interests and concerns of affected stakeholders and meet the needs of the decision-making organization.

Engagement is also an opportunity to strengthen relationships among stakeholders and decision makers, share information, and build mutual understanding and consensus.

A speech bubble containing the text "Why Engage?" is positioned above three stylized human figures. The central figure is a doctor wearing a stethoscope, flanked by two other people.

Why Engage?

Meaningful physician engagement leads to better patient care

Impacts	Benefits
<ul style="list-style-type: none">• health and system efficiency• cost reduction• improved health outcomes• decreased errors	<ul style="list-style-type: none">• greater job satisfaction• improved patient satisfaction• performance• efficiency• innovation

Perreira et al. (2019). Physician engagement : a concept analysis. *Journal of Healthcare Leadership*, 11, 101-113. Available here: <https://pubmed.ncbi.nlm.nih.gov/31440112/>

A stylized icon of a hospital building with a large letter 'H' inside a circle at the top.

MSA role in supporting engagement outcomes

- Support physicians to connect with each other
- Support physicians and health authorities to find common ground and solutions
- Improve patient care and the work environment

An icon showing three stylized human figures. The central figure is a doctor with a stethoscope, and they are holding a document or tablet.

Divisions' role in supporting engagement outcomes

- Support FPs to work together
- Support FPs to work together with system partners
- Improve clinical practice and address gaps

GUIDING PRINCIPLES FOR STRONG ENGAGEMENT



PLANNING FOR ENGAGEMENT

[Quick reference. See page 7 for a deeper dive into guidance for each action.](#)

7 Actions to Take

Maximize the potential for success during the engagement planning phase

Action 1 Understand the norms of your community, whether your community is a geographical area, or a particular group of individuals brought together by virtue of a similar situation or special interest.

- What is expected of us in this community?
- What is this community's preferred approach to engagement?
- How can we meet this community's needs through engagement?

Action 2 Identify clear objectives.

- Why is a particular engagement activity being considered now?
- What are the desired objectives or outcomes of the engagement activity?
- Would the development of Terms of Reference help provide clarity?

Action 3 Identify intended participants and participant groups.

- Which groups or individuals should be involved to meet the objectives or mandate of the engagement?
- Which groups or individuals would ensure representativeness and/or contribute to your commitments to Truth and Reconciliation?

Action 4 Clarify roles and responsibilities in the engagement.

- Are individual participants representing themselves? Or a group of people?
- What is expected of each person or group in terms of their contribution?

Action 5 Choose an appropriate level of engagement.

- Which is the appropriate level of engagement for this activity?
(See chart on page 12.)
 - Inform
 - Consult
 - Involve
 - Collaborate
 - Empower

Action 6 Choose a specific engagement method or approach.

- What exactly will we do to engage?
- Which engagement approach best meets our needs? (e.g., set up an advisory committee, hold a consultation meeting, gather input through a survey, etc.)

Action 7 Communicate your objectives and expectations around level of influence on decision making

- How will we transparently communicate the objectives, steps, and anticipated outcomes of the engagement to stakeholders?



IMPLEMENTING ENGAGEMENT

[Quick reference. See page 20 for a deeper dive into guidance for each action.](#)

5 Actions to Take

Maximize the potential for success during the engagement implementation phase

Action 1 Create psychological safety

- How will we ensure that participants feel like they can openly contribute to the engagement?
- How will we ensure interpersonal trust and mutual respect throughout the engagement?

Action 2 Make decisions together

- How, exactly, will we reach decisions (e.g., voting, consensus)?
- How do we define a “vote” or “consensus”?

Action 3 Embrace and transform conflict

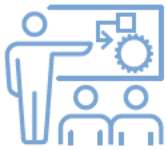
- How will we respond to conflict?
- What approach will we take to move through conflict?

Action 4 Feed/close the feedback loop

- How will we keep stakeholders informed of the outcomes of the engagement activity?

Action 5 Evaluate engagement

- How will we troubleshoot engagement challenges to get our engagement activity or approach back on course?
- How will we take stock of our learnings around engagement?



PLANNING FOR ENGAGEMENT

Action 1 Understand the norms of your community

Understand the norms of your community - whether your community is a geographical area or a particular group of individuals brought together by virtue of a similar situation or special interest.



- What is expected of us in this community?
- What is this community's preferred approach to engagement?
- How can we meet this community's needs through engagement?
- What must we consider to ensure cultural humility and cultural safety?

Communities are not homogeneous entities. They are made up of diverse groups with different histories, social structures, value systems and cultural understandings of the world.

In planning the engagement, take a step back and work to **understand the cultural dynamics of the people and institutions in the community** in order to build relationships, identify ways to effectively collaborate and to build respect and trust.

Cultural humility is a process of self-reflection aimed at understanding both personal and system biases, in order to develop and maintain respectful processes and relationships based on mutual trust.

Cultural humility involves humbly acknowledging oneself as a learner when it comes to understanding another's experience. **It is about changing not just attitudes and thinking but also actions and practices.**

Additional Resources

To address the systems of colonialism and to positively impact the health and wellness of Indigenous peoples in BC, engagement needs to be grounded in cultural humility. The following frameworks and guides provide guidance on engaging with Indigenous communities.

- [The First Nation Health Authority's Policy Statement on Cultural Safety and Humility](#)
- [The Kootenay Boundary Division of Family Practice - Indigenous Engagement and Cultural Safety Guidebook: A Resource for Primary Care Networks](#)
- [Bob Joseph's Working Effectively with Indigenous Peoples blog](#)
- [94 Calls to Action from the Truth & Reconciliation Commission](#)
- [First Nations Health Authority's Engagement Process](#)
- [BC Patient Safety and Quality Council resources: Cultural Safety & Humility](#)
- [Community Futures British Columbia Aboriginal Engagement Toolkit](#)
- [Doctors of BC's commitment to Diversity and Inclusion](#)
- [Additional equity, diversity and inclusion resources for physicians](#)

Action 2 Identify a clear objective: why are you engaging?

Establishing expectations before starting is well worth the time. Successful engagement starts with the understanding your greater “why.”



- Why is a particular engagement activity being considered now?
- What are the desired objectives or outcomes of the engagement activity?
Share information? Gather feedback? Make important decisions?
- What is in-scope and out-of-scope for the engagement?
- What negotiables and non-negotiables that everyone should be aware of?
- Are there existing assumptions about the issue? If so, what are they?
- Is the engagement being undertaken to meet a pre-existing mandate or policy?

Consider the benefits of developing **Terms of Reference**, which are rules of engagement explicitly drafted and made available to all stakeholders. They are guided by the context and establish clarity, transparency, and accountability for:

- the purpose of the engagement
- the role of participants
- anticipated outcomes of the engagement

Terms of Reference may be **short and less formal** – even only a paragraph or two – **or formal and robust** for high-impact/high complexity engagement. They can be particularly helpful at the *collaborate* level, where groups are undertaking to work together as equal partners.

If Terms of Reference exist through a pre-existing process, initiative, or collaborative, ensure they align with your engagement plans.



Terms of Reference may seem redundant when the engagement process is proceeding smoothly. However, they are well worth it in terms of setting ground rules and anticipating processes if difficult situations such as deadlocks and erosions of trust arise.



Six common objectives to consider as a starting point for identifying your own “why”.

→ [Six common objectives](#)

Communicate your purpose with all relevant stakeholders as early as possible to create an understanding of the process and intended results. These resources provide guidance on communicating with busy physicians and other stakeholders.

→ [Communicating for Engagement](#)

If you are working to better understand physician needs around engagement, consider adapting these survey questions to gather physician input.

→ [Medical Staff Membership Engagement Survey](#)

Action 3 Identify intended participants and participant groups: who should participate?



- Which groups or individuals want to be involved?
- Which groups or individuals should be involved to meet the objectives or mandate of the engagement?
- Which groups will be affected by the outcome?
- Which groups or individuals have expertise related to the issues or are influential on the issue?

Which groups or individuals would ensure representativeness and contribute to your commitments to equity, diversity, and inclusion? Could you benefit from an outreach plan to better reach these groups?

Depending on the short-term pressures (e.g., practicalities and time pressures) and long-term considerations (e.g., building of relationships and trust), consider:

- inviting only the formal representatives of the groups identified
- expanding the invitation to other individuals or identified groups



If more individuals would like to participate than is feasible, consider alternative ways of engaging and ultimately, provide transparent rationale for decisions around inclusions/exclusions.



Use stakeholder mapping to identify all relevant stakeholders who could be involved, and determine how much engagement and communication each group might need.

- [Stakeholder map](#)

Action 4 Clarify roles and responsibilities for successful engagement: Who will do what?

Ensuring everyone is clear on their own roles and the roles of others will bring clarity to the engagement process.



- Are individual participants representing themselves? Or a group of people?
- What role does each person play in bringing issues to the constituents they represent? What role do they play in bringing issues to appropriate leaders?
- What are expectations of their participation? Is it one time or it ongoing?
- Are individuals expected to champion the ultimate decision, once made?
- What is expected of each person or group in terms of their contribution?
- How are participants expected to “show up” to the engagement? Which skills are they expected to have/demonstrate?



Roles and responsibilities may be pre-determined through an external process (e.g., policy) or may need to be co-developed by participants. Roles should be reviewed regularly to continue to align with the process.

Action 5 Choose an appropriate level of engagement

Which of the following is the appropriate level of engagement for this activity?

- Inform
- Consult
- Involve
- Collaborate
- Empower

The engagement may be a mixture of levels of influence (e.g., mixture of *inform*, *consult*, *involve* and *collaborate*).

IAP2 Model Framework

The [International Association of Public Participation Spectrum of Public Participation framework \(IAP2\)](#) can help to plan, set expectations, and enable more effective engagement among stakeholders.



The further along the spectrum, the more influence and impact the engaged party has on the decision. Higher levels are not necessarily better. Rather, the choice of where on the spectrum one chooses to engage is entirely dependent on the purpose of the engagement and the context.

For example, if the goal of engagement is to gather input and feedback that will feed into an external decision-making process, the appropriate level is likely *consult* rather than *collaborate*.

Choosing the appropriate level of engagement and communicating it to participants and other stakeholders **will help ensure the engagement is authentic**, not merely symbolic. Inauthentic engagement, erodes trust, an important enabler of effective engagement.

It goes without saying that merely saying one is *collaborating* does not make it so.

IAP2 Guiding Principles

Inform	Consult	Involve	Collaborate	Empower
<p>To provide balanced and objective information and context to assist in understanding challenges, opportunities, or solutions.</p>	<p>To obtain, listen and acknowledge input and feedback on alternatives to help inform decisions and tailor activities. (How the feedback and input ultimately influences the decision making is subsequently shared back to the participant.)</p>	<p>To work directly with interested and impacted parties to ensure that ideas, concerns and needs are consistently understood and considered.</p>	<p>To partner in each aspect of the decision including the development of alternatives and the identification of the preferred solution. Stakeholders are equal decision makers.</p>	<p>To place the final decision-making in the hands of some of the key interested and impacted parties.</p>
<p><i>“Here are some things you need to understand.”</i></p>	<p><i>“This is what we are thinking of doing, do you have any advice? We’ll come back to you later and tell you how and to what extent we used your advice.”</i></p>	<p><i>“We will work with you to ensure your concerns and needs are directly reflected in the decisions made.”</i></p>	<p><i>“The decision is jointly ours. We will implement what we jointly decide.”</i></p>	<p><i>“Let’s work together from the very beginning and we’ll incorporate your advice and recommendations to the maximum extent possible.”</i></p>



How much time is available for decision making?

In general, the higher up on the engagement spectrum, the more time is required to come to a decision point. While it may be feasible to *inform* through a single information session, it may be weeks or months for a group of stakeholders to *collaborate* on important decisions impacting their work.



Once the appropriate level of engagement has been identified, ensure that adequate time and resources are available to truly fulfill the purpose and congruent level of the engagement.



The International Association of Public Participation (iap²) has a number of resources available on their website including free webinars and research papers.

- [Main IAP2 website](#)
- [Canadian website](#)
- [Research papers](#)
- [Free webinars](#)

Action 6 Choose a specific engagement method or approach

Consider these examples of different tools or approaches to determine the purpose and needs of the engagement of your intended participant group.

Inform	Consult	Involve	Collaborate	Empower
Objective				
<i>“Here are some things you need to understand.”</i>	<i>“This is what we are thinking of doing, do you have any advice? We’ll come back to you later and tell you how and to what extent we used your advice.”</i>	<i>“We will work with you to ensure your concerns and needs are directly reflected in the decisions made.”</i>	<i>“The decision is jointly ours. We have an equal voice. We will implement what we jointly decide.”</i>	<i>“Let’s work together from the very beginning and we’ll incorporate your advice and recommendations to the maximum extent possible.”</i>
Example Approach or Tool				
<ul style="list-style-type: none"> • Email • Posters • Presentations • Information sessions 	<ul style="list-style-type: none"> • Consultation meetings • Structured and representative focus groups • Surveys • Advisory committees 	<ul style="list-style-type: none"> • Consultation meetings • Structured and representative focus groups • Surveys • Advisory committees • Online platforms such as Bang the Table or Slack 	<ul style="list-style-type: none"> • Collaborative workshops • Shared governance or decision-making committees 	<ul style="list-style-type: none"> • Referendum • Panel made up of empowered stakeholder group(s) (e.g., physician panel)

While there are likely established ways of “doing things” in your setting, consider whether they will truly reach your objectives and intended participants.

For example, if e-mail is the customary way in which a large group of individuals are generally *informed*, inbox overload may in fact make this approach *less likely* to reach the intended audience.



- Potential advantages, disadvantages and required resources of each level of engagement.

Example: A consideration of potential approaches at the *consult* level:

Potential approaches	Potential advantages	Potential disadvantages	Required resources and skill set
<p>Consultation meetings</p> <ul style="list-style-type: none"> • Often conducted by anyone with some facilitation skills with a convenience group of available participants • Gathers input from participants and also shares information 	<ul style="list-style-type: none"> • Familiar format for many • Opportunity to share own thoughts and input and also hear other thoughts and feedback • Opportunity to ask questions 	<ul style="list-style-type: none"> • Time consuming to hear from a diversity of voices • Scheduling can be challenging given work and life schedules 	<ul style="list-style-type: none"> • Strong facilitation skills • Strong interpersonal skills among engagement leaders and participants • Adequate space and time
<p>Structured and representative focus groups</p> <ul style="list-style-type: none"> • More formal, generally facilitated by individuals with high skills/expertise • Participants selected based on their representativeness – a full diversity of voices • Objective and thorough • Captures a wide variety of perspectives 	<ul style="list-style-type: none"> • Can achieve purposeful and intentional representativeness of voices • Opportunity for high psychological safety 	<ul style="list-style-type: none"> • Only a small number of participants can be invited to participate • Limited opportunities for participants to ask questions • Limited opportunities to come to a common, shared understanding 	<ul style="list-style-type: none"> • Strong focus group moderator skills • Focus group data analysis skills • Understanding of limitations of methodology • Usually administered by skilled third party or external consultant

Potential approaches	Potential advantages	Potential disadvantages	Required resources and skill set
<p>Surveys</p>	<ul style="list-style-type: none"> • Relatively quick for participants • Participants can complete on their own time • Potential to reach a large number of participants 	<ul style="list-style-type: none"> • Rigidity of answering pre-existing, often close ended questions (multiple choice) • Limited opportunities for participants to ask questions • Limited opportunities to come to a common, shared understanding • Limited participation due to survey fatigue 	<ul style="list-style-type: none"> • Survey development skills • Survey deployment tools (e.g., survey platform that meets privacy requirements) • Data analysis skill • Understanding of limitations of survey methodology



Which approach or tool (or combination of approaches or tools) will:

- meet your engagement objectives?
- best reach the intended participants?
- pose potential barriers to success (e.g., scheduling, level of effort, time pressures)?
- require resources and skills to implement?
- contribute to long-term objectives? (e.g., build solid relationships with stakeholder groups; achieve greater understanding of overarching context)
- contribute to your commitments to cultural humility?



A number of resources are available providing information on various engagement methods and approaches.

- [The Policy Project: excellent resources for selecting methods for Community engagement](#)
- [Tamarack Institute's Index of Community Engagement Techniques](#)
- [Sparc BC's Community Engagement Toolkit](#)

Action 7 Communicate your objectives and expectations around level of influence on decision making

Spend the time needed to communicate the level of influence the engagement will have on decision making. Be realistic and transparent, and ensure participants clearly understand the purpose, scope and intended outcomes of the engagement.

A very successful *consult* engagement will be seen as a failure if it was promised to be at the *collaborate* level.

In determining what to communicate, consider sharing answers to the following questions with the group with whom you are engaging.



- What is the objective of the engagement?
- What is the chosen level of engagement (and why, if this is not likely to be clear)?
- What are the anticipated outcomes?
- What is the overall context?
- What is in-scope and what is out-of-scope?
- What are the negotiables and non-negotiables?
- What is the timeline? What will happen after this?



It is better to be realistic and transparent on the rationale for the chosen level of engagement, than to overpromise and under deliver.

If stakeholders are dissatisfied with the promised level of influence, acknowledge their disappointment, and communicate your rationale.

If appropriate, increase their level of influence more in line with their expectations in future.



IMPLEMENTING ENGAGEMENT

Action 1 Create psychological safety

Different levels of engagement may require different approaches to maximizing psychological safety; a climate characterized by interpersonal trust and mutual respect in which individuals can learn and contribute; an environment where individuals feel respected and are not afraid to speak up to share their true thoughts and ideas.

Structuring the engagement

While group psychological safety is something that is cultivated over time, there are opportunities to increase psychological safety within your specific engagement:

- **Make psychological safety an explicit priority of the engagement**
- **Ask individuals what they need** to feel psychologically safe and be transparent regarding what you are committing to (and what is possible in the circumstances)
 - Set out specific ground rules for the engagement that strongly support respectfulness and fairness
- **Ensure structures are in place** to allow space for a diversity of voices
 - The more diverse the participants and the more complex the issue, the more time will be required for true psychologically safe participation
 - A formal facilitator, who does not have a stake in the issue, can help ensure everyone has a chance to contribute
 - Replace approaches that favour participation of only a few vocal voices, with approaches that promote wider participation and/or that focus on building trust
- **Take stock of how the engagement is unfolding** and be prepared to pause and adjust in order to keep your commitment to psychological safety

Your individual contribution

In addition to structuring your engagement opportunity to maximize psychological safety, your own approach and behaviours are important to promoting psychological safety:

- **Be as transparent as possible** and acknowledge when you are unable to share information
- **Acknowledge areas of ambiguity:**
 - “You are right, it is not yet clear how we will tackle that situation.”
 - “At this time, we remain unsure about....”
- **Model curiosity, openness and flexibility** at every occasion:
 - “I am curious to learn more about that idea. Can you share a little bit more about that?”
 - “That’s a perspective that I had not considered.”
 - “I wonder how we might be creative and incorporate both of our ideas...”
- **Show your own vulnerability and emotion** (i.e., be your true self!):
 - “I am feeling a little anxious about the proposed timeline....”
 - “In thinking this part through, I wish we had ...”
 - “I’m worried that we are headed....”
- **Use your very best active listening skills**
- **Embrace and transform conflict (see below)**



To support psychological safety, consider co-creating ground rules or shared norms for the engagement. Groups are often well-served by adopting a coherent, ongoing set of agreements about how people will interact with each other during the meetings. This sample template provides an example of 7 ground rules and how they can be incorporated into a visual to share with participants and stakeholders.

→ [Ground rules or shared norms](#)

Action 2 Adopt an approach for making decisions together

When making decisions as a group (e.g., collaborate), the way in which decisions are made can have a large impact on participants. Adopt a decision-making model based on the premise that all engaged participants' voices are worth hearing and all concerns come from a place of integrity.



- Have you built in space in your approach/agenda to hear from all engaged participants?
- How will you capture the full range of thoughts and opinions?
- Making high stakes and/or complex decisions is a resource intensive process. Have you allocated sufficient time?
- Do you need additional resources such as a skilled neutral facilitator?

Formalizing decisions:

- Will decisions come to a vote?
 - Who is entitled to vote?
 - Who can call a vote?
 - When can a vote be called?
 - Will a simple majority lead the vote (i.e., greater than 50%)?
- Will decisions be made on a consensus basis?
 - How is consensus defined?
 - How will consensus be achieved?
 - What if consensus cannot be reached?



Consider whether you want to explicitly identify how and when decisions will be made in a Terms of Reference document to help establish common understanding across all stakeholder groups.



The Kootenay Boundary Division of Family Practice has created a useful document outline their consensus protocol.

→ [Consensus protocol](#)

Short guide with an overview of consensus decision making tools.

→ [Seeds of Change Consensus Decision Making Guide](#)

Action 3 Embrace and transform conflict

Conflict is a normal part of human relationships. There are several reasons why conflict might occur. Like an iceberg, some of the reasons lie above the surface, while others lie beneath the surface and are less evident. Some causes of conflict might include:

- Lack of understanding/misunderstanding
- Differences in approaches or styles
- Differences in values or goals
- Low trust

The challenge with conflict is not that it exists but rather how we respond to it. In large part, it is not possible to change or control how other individuals behave in a conflict. And often, the situation itself cannot easily be changed. Instead, what you can change and control, is how you, yourself, behave and respond to conflict.

The appropriate response to conflict will depend on several factors, including:

- the seriousness of the conflict
- the importance of that task/issue at hand
- the importance of the relationship



In choosing how you will respond to a given conflict situation, consider whether additional resources (e.g., time, facilitators) might help support better outcomes.



This tool will help you understand different conflict-handling styles and support you in choosing the appropriate response to a given conflict.

→ [Thomas Kilman Conflict Resource](#)

Consider adopting the Rules of Inquiry as part of your Terms of Reference. They provide a framework for stepping beyond your own individual judgements and assumptions to focus deeply on the task at hand by standing in inquiry.

→ [Rules of Inquiry](#)

Action 4 Feed/close the feedback loop

The engagement process is not completed until feedback is provided to participants, either by providing feedback to those who directly participated in the engagement or the entire community. Providing feedback on how the engagement activity influenced the ultimate decisions is an important way to build and maintain relationships with key stakeholders and may include:

- Thanking participants for their important contributions
- Sharing information on the process of the engagement
- Sharing information on the decision reached, including when and by whom
- Sharing information on how participant views were considered and how they influenced the ultimate decision
- If appropriate, providing an opportunity for comments or suggestions on the engagement experience

Depending on the nature of the engagement, **the feedback loop might occur over successive sessions.**



Consider thinking of feedback as a loop, whenever feedback is gathered there is an opportunity to share back how the feedback was used in decision making. This diagram provides a visual depiction of the feedback loop.

→ [Feedback Loop](#)

This feedback loop template can be used to summarize and communicate the engagement process. It can be shared verbally at small sessions with the original stakeholders, or at larger sessions such as MSA meetings, forums, or townhalls; and as e-mail or newsletter follow-up as appropriate.

→ [Feedback Loop Communications Template](#)

Action 5 Evaluate your engagement

There are likely several opportunities to learn and improve over the engagement period:

- If the engagement is not going as planned, take the time to evaluate and regroup, to set the engagement back on track.
- If the engagement is going particularly well, take the time to capture the processes, activities or decisions that have made the engagement successful.

Evaluating and troubleshooting your engagement can be done in a variety of ways:

- Informal approaches to evaluating and troubleshooting include individual and group reflection, sometimes termed as “a debrief”. Ideas and lessons are captured in a more ad-hoc manner.
- Formal evaluations can also take place, many of which are detailed in the Facility Engagement Initiative *Planning and Evaluation Toolkit* linked in the resources below.



Consider adapting tools from the Facility Engagement Planning and Evaluation Toolkit to evaluate your engagement. Also of potential use is Facility Engagement’s Survey Best Practices Checklist.

→ [FEI Planning and Evaluation Toolkit](#)

→ [FEI Survey Best Practices Checklist](#)