[Insert organisation logo]

# 

# **Consumer partnership plan**

## **[Insert name of program / project]**

[Date]

## Contents

[Key terms / glossary 2](#_Toc67488135)

[About the activity/project/program being undertaken 2](#_Toc67488136)

[Purpose of this plan 2](#_Toc67488137)

[Objectives 2](#_Toc67488138)

[Stakeholders 3](#_Toc67488139)

[Level of participation 4](#_Toc67488140)

[Commitment to consumer stakeholders 5](#_Toc67488141)

[Timeframes 5](#_Toc67488142)

[The role/s of consumers 6](#_Toc67488143)

[Consumer supports 6](#_Toc67488144)

[Recruitment strategy 7](#_Toc67488145)

[Budget 8](#_Toc67488146)

[Resourcing 8](#_Toc67488147)

[Limitations, risks and mitigation strategies 8](#_Toc67488148)

[Feedback 9](#_Toc67488149)

[Evaluation/review 9](#_Toc67488150)

[Insert organisation’s publications details; e.g. copyright, version control and record-keeping, contact details, etc]

# Key terms / glossary

[Insert any program/institute/project terminology that is relevant – pay attention to acronyms and key terms that are frequently used.]

**Acronym**

Description

**Acronym**

Description

**Term**

Description

# About the activity/project/program being undertaken

[Provide a brief description. Note: keep it simple – this document should be made available to your consumer partners when they come on board.]

# Purpose of this plan

[Outline the purpose of this plan in the context of your organisation and program/project.]

*Example: This plan outlines how we intend to partner with consumers throughout the different types and level of activity we undertake. It describes a variety of approaches that align with the spectrum of consumer participation.*

*The plan ensures we have thought through the best ways to partner and what our approaches will be. Anyone who reads this plan should be able to follow and enact its intent.*

# Objectives

[Provide the objectives of this plan in the context of your program/project.]

*For example:*

* *To ensure consumer partnership is achieved within all activities defined.*
* *To increase the network’s consumer members from one to five people by December 2021.*
* *To ensure publications developed are person-centred, easy to understand and contain the information consumers want to know.*
* *To build our organisation’s confidence in consumer partnership.*
* *To increase consumer partnership with priority and diverse groups.*

# Stakeholders

[Who are your key stakeholders and what is the demographic profile of your consumer stakeholders?

[**Important!** Have you included Aboriginal and Torres Strait Islander communities, and other priority groups?]

# Level of participation

[What will be the level of participation from consumer/s?]

*For example:*

|  |  |  |
| --- | --- | --- |
| Activity | Level of participation | Method of participation |
| *Committee membership* | *Collaborate and empower* | *Committee member with equal input, rights and power as other committee members. Has allocated responsibilities and a regular agenda item to speak to.* |
| *Develop consumer information pamphlets* | *Collaborate and  co-design* | *Consumer committee member leads a co-design workshop with consumers around the development of first draft pamphlets. Presents recommendations to project team. Consumer continues to collaborate with consumer groups until final versions are complete.* |
| *Consumer experience stories at team/service development day* | *Consult* | *Consumer/s share their stories of experience, strength and hope via staff development days/ organisation-wide events. Intent is engendering commitment to person-centred care and to re-imagine purpose.* |
| *Engage Aboriginal and Torres Strait Islander communities to provide feedback and perspectives at key points in the program.* | *Consult* | *Work with Aboriginal health networks and Liaison to set up yarning circles with Aboriginal and Torres Strait Islander communities and understand their thoughts, feelings and concerns about the program.* |
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# Commitment to consumer stakeholders

[What is your commitment to your consumer stakeholders? How will you meet this commitment?]

*For example:*

|  |  |
| --- | --- |
| Commitment | How |
| *Consumer committee members will receive a quarterly update of what has been achieved and actioned as a result of their feedback and input.* | *Set an alert on the calendar at the start of the year to ensure a short report is prepared and this is added to the agenda. Agenda item Consumer partnership: Celebrating the wins* |
| *Consumer committee members are provided education/training support options available internally and externally.* | *Conversation with consumer determines what their support needs are, and this is built into the partnership agreement. Review agreement every six months.* |
| *All consumers we engage in focus groups will receive an update of what we actioned as a result of the feedback. This update also includes what didn’t get actioned and why.* | *Project lead to set alert six weeks post focus group to send one-page letter/newsletter/email to participants outlining achievements.* |
| *Consumers who share their story at staff/service development days receive an evaluation of the day with comments on their story and the impact it had.* | *Ensure evaluation of the day includes a section on the consumer story and note to staff that this feedback will be forwarded to the consumer.* |
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# Timeframes

[Outline the timeframes for your activities in the calendar year. Some partnership activities (e.g. committee meetings) are ongoing. However, even in these cases, a commitment of no more than 12 months should be agreed upon. The person can be re-elected into a role after 12 months but should still occur under a process.]

*For example, workshops, focus groups, interviews, development days, surveys, consultations should all be built into the project plan – allowing for the time it takes to coordinate and set up. Commitments should also be built into the project plan.*

# The role/s of consumers

[Consider all the different elements of the consumer partner roles you have in mind. What are the things that need to be clear? Think about this the same way you would if you were recruiting to a paid position. Document this information in a way that works for you – this could be under headings or within a table.]

*For example, below are some thought starters:*

* *Outline the different role/s you want consumer partners to fill.*
* *What are the expectations and deliverables of those roles?*
* *What skills and experience do you want the consumers to have?*
* *Do you want/need any special skills or experience – what are these?*
* *What will the role be able to influence?*
* *What won’t it be able to influence?*
* *Is this role just representing their own voice and experience or also the experience of others? If so, how do you want them to access wider opinion and perspective?*
* *Does this role have any systemic advocacy function (i.e. do you want them to provide feedback on what works and what doesn’t systemically)?*
* *How do you want their feedback delivered?*
* *What other options can be made available for feedback if face-to-face feels daunting or difficult?*
* *How will you ensure psychological safety of the consumer partner/s?*

# Consumer supports

*[Elements of this may have been included in your ‘commitment’ section, but what are the measures you will put in place to support your consumer partner/s? These will also differ according to the level of engagement.]*

*For example, refer to the table on the next page:*

| **Minimum support requirements** | **Consumer committee members** | **Consumer participating in focus group/workshop** |
| --- | --- | --- |
| *Position description* | *Clear understanding of intent of session* |
| *Partnering agreement (terms, conditions and duration of role)* | *Signed consent form* |
| *A liaison/mentor from within the organisation or program to debrief and touch base with out of session, if required* | *Explanation of what we will do with their information* |
| *Quarterly review and reflection with project lead – is this still working?* | *Opportunity for debrief and support during and after session (second facilitator support)* |
| *Access to training (internal and external)* | *Opportunity to exit the session* |
| *Links to other consumer partners and groups for networking and peer support* | *Follow-up phone call* |
| *Pathway to exit the partnership agreement if they need to retire/resign* | *Information about what occurred as a result of their input* |
| *Anything else determined by them to be important when you onboard them* | *Anything else relevant to context (e.g. interpreter, Aboriginal liaison officer)* |
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# Recruitment strategy

[Depending on the activity, there are numerous ways and places you can promote your activity to consumers – identify what these might be.]

*For example:*

* *EOI circulated to key consumer groups.*
* *Call to action poster put up in patient waiting areas.*
* *Collaboration with consumer engagement units/managers in local health districts.*
* *Sample group of discharged patients, such as ex-service users.*

# Budget

[What is your budget for consumer partnership?]

*Consider:*

* *reimbursement of out-of-pocket expenses (e.g. travel, parking)*
* *catering for focus groups/workshops*
* *facilitator fees if unable to facilitate groups internally*
* *annual “thank you” gift for long-standing partners.*

# Resourcing

[What resources do you have available to support consumer partnership?]

*For example:*

* *Human resources – team members/who can support/lead?*
* *Agency for Clinical Innovation consumer partnership website and* [*co-design toolkit*](https://aci.health.nsw.gov.au/projects/co-design/home)
* *Time available*

# Limitations, risks and mitigation strategies

[What might be some limitations and risks, and how will you mitigate these?]

*For example:*

* *Budget*
* *Timelines and deadlines*
* *Pre-determined outcomes*
* *Political and environmental risks*
* *Relationships*

| **Limitation / risk** | **Mitigation strategy** |
| --- | --- |
| *Another committee member is hostile to consumer partnership* | *Run a roundtable workshop with committee to determine why. Supplement with survey for anonymity. Work through the concerns as a group and reach consensus.* |
| *“Difficult” consumer with multiple agendas that threaten to derail the process* | *Robust recruitment, interview and selection, clear partnership agreement and position description with expectation of role outlined.  Work through code of conduct and sign off.*  *Outline that quarterly reviews are designed to assess other partnership is still working, both parties can bring concerns to the table.* |
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# Feedback

[Primary feedback will be delivered during the partnership activity. What other mechanisms for providing feedback should be made available for the consumer partner?]

*For example:*

* *out-of-session catch-ups*
* *email submission*
* *written response*
* *quarterly review*

[Note: In any partnership, feedback goes both ways. What mechanisms are in place for you to provide your consumer partner feedback (good and bad) in a way that is safe and respectful? Many of these you will have highlighted in the ‘Commitment to consumer stakeholder’ section.]

*For example:*

* *Quarterly review*
* *‘Celebrate the wins’ agenda items at project meetings*
* *‘Closing the loop’ strategies*

# Evaluation/review

[What mechanisms have you put in place to evaluate/review whether the partnership is working?]

*For example:*

* *As a project, have you considered an evaluation of the consumer partnership activity to be included in your broader program evaluation?*
* *How do you know if it is/has been a success?*