



Supporting equity-centred engagement:

A step-by-step guide with tailored resources

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PUBLIC AND PATIENT
ENGAGEMENT
COLLABORATIVE

Public Engagement
in Health Policy



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Supporting equity-centred engagement: A step-by-step guide with tailored resources

Introduction

Equity is an important consideration in all facets of engagement work. It emphasizes fairness, impartiality and the welcoming of people with a range of identities and ideas to be heard, valued, and understood. Inclusion and diversity are valuable elements of an equity-centred approach to engagement; they ensure that the conditions are created for all people to contribute in positive and mutually beneficial ways and recognize that some individuals and groups need focused attention and increased investment to achieve equitable outcomes.

As groups and organizations seek to bring a stronger equity focus to their engagement work, there are many things to consider and a growing number of resources to support this work. Our goal is to help you navigate the many helpful resources that exist to help centre equity in your engagement work. We offer this step-by-step guide to help you with this important work.

How This Guide Was Developed

This guide was developed through a collaboration between the [Public and Patient Engagement Collaborative \(PPEC\)](#) and the [Public Engagement in Health Policy \(PEHP\) Project](#) at McMaster University.

Resources and tools were identified through a comprehensive search conducted between June and July 2022 and reviewed across four descriptive categories (comprehensiveness, ease of understanding, functionality, and partner engagement) to curate a set of resources to support equity-centred engagement. This set of resources is not exhaustive, but our hope is that together, they provide a good starting point for groups and organizations to bring an equity focus to their engagement work. For more details about our methods and a short summary of each of the resources that appear in the guide below, please see Appendices A-C at the end of this document.

How To Use This Guide

This guide was mainly designed for people doing engagement work in health system and/or health policy contexts; however, we have included a small number of relevant and useful resources that have a research focus. For each step in this guide, we have included links to key resources that provide focused support for a particular aspect of equity-centred engagement and linked to the specific section of each resource that is most relevant. A single resource may appear several times, but the section of the resource will change. As well, an interactive version of this guide can be found [here](#). These resources will guide you through the key considerations for each step in the guide, and we encourage you to reflect on them in relation to the specific contexts of your organizations, the issues you wish to address, and the populations you seek to engage with.

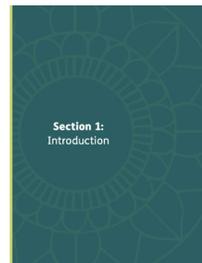
Citation: Ul-Haq M, Dhamanaskar R, Tripp L, Rodgers J, Abelson J. Supporting equity-centred engagement: A step-by-step guide with tailored resources. Public and Patient Engagement Collaborative. Hamilton, Canada: McMaster University, 2023.

How can we prepare to engage in a way that centres equity?

It is important to consider how you plan to champion equity in your engagement work. This can be challenging and time-consuming work, but it is necessary to avoid perpetuating inequities and harms. There are several things to consider in this step, including having a thorough understanding of equity and its relevance to engagement and reflecting on your own roles and positions within the engagement process.

Understanding equity and related terms and concepts

Beyond Inclusion: Equity in Public Engagement



Section: [Introduction - Key Definitions](#)

Diversity, Equity & Inclusion Elevating the Voices of All in British Columbia



Section: [Indigenous, First Nations, Métis, and Inuit Cultural Safety and Humility](#)

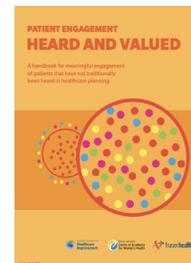
Recognizing why taking an equity-centred approach to engagement is needed

Beyond Inclusion: Equity in Public Engagement



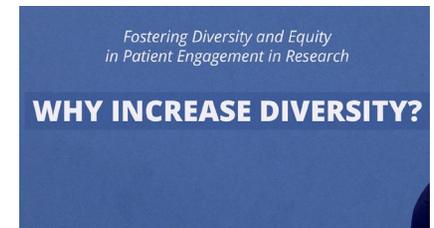
Section: [Introduction](#)

Patient Engagement Heard and Valued



Section: [3. Not all patients are heard](#)

Methods for Supporting Diverse Patient Engagement



Section: [Why Increase Diversity? Video](#)

Reflecting on our roles and positions

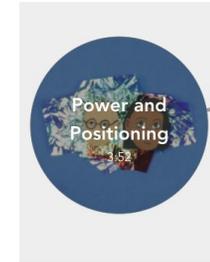
Note: While some resources in this guide have a research focus, ideas and concepts from these resources can be useful and relevant within health systems and policy contexts. Knowledge gained from the history of engagement work within research can help strengthen engagement work in health systems and policy.

Research 101: A Manifesto for Ethical Research in the Downtown Eastside



Section: [Getting to Know Each Other](#)

Methods for Supporting Diverse Patient Engagement



Section: [Power and Positioning Video](#)

How do we plan for engagement that centres equity?

The planning step will set the stage for your engagement activities. When planning your engagement work, you can centre equity by carefully considering who and why you want to engage, building an understanding of the communities you wish to engage, and setting your engagement goals.

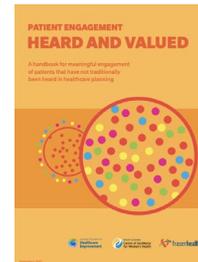
Thinking about who we want to engage with and why

Equity in Engagement Framework



Section: [Step 1 - Articulate A Clear Purpose](#)

Patient Engagement Heard and Valued



Section: [4.2 - Engaging patients with diverse experiences](#)

Making Space: Centering Equity in Planning

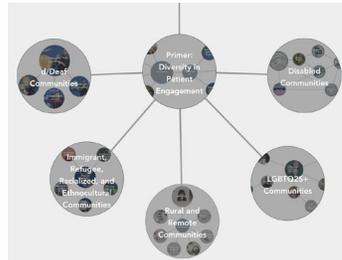


Section: [Mapping and Goal Setting Worksheet](#)

Understanding the populations we hope to engage with

Note: Communities consist of people with diverse experiences, identities, and perspectives. Understanding the communities you hope to engage with is an extensive process that requires ongoing work. This section is not meant to provide expertise on a community but rather provide some important considerations.

Methods for Supporting Diverse Patient Engagement



Sections: [Community modules](#)

Beyond Inclusion: Equity in Public Engagement

Understanding Reconciliation and Decolonization

The Truth and Reconciliation Commission of Canada notes that:

“Reconciliation is about establishing and maintaining a mutually respectful relationship between Aboriginal and non-Aboriginal peoples in this country. In order for that to happen, there has to be awareness of the of the past, an acknowledgment of the harm that has been inflicted, atonement for the causes, and action to change behaviour.”¹¹

Section: [Understanding Reconciliation and Decolonization](#)

Culturally Safe Engagement: What Matters to Indigenous (First Nations, Métis and Inuit) Patient Partners?

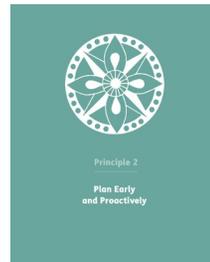
1. Awareness and Understanding

Key Message	Acknowledge the history of racism in Canada and the impact of systemic racism on us. Have a level of cultural awareness and sensitivity.
Recommendation	Work to eliminate biases and stigma. Remember, no single health care experience puts a patient in a vulnerable position and it may be ongoing. Include questions about points-of-care aspects (individual interactions with health care partners) to better understand our experiences.
Action	Start off with: Provide a meaningful level of acknowledgement. Research it, write it down and incorporate it into meetings. Get to know people from the territory you live, work and play on. Be a learner, meet about the Indigenous culture in your area, attend local Indigenous events and activities. Make a commitment to cultural safety and humility, anti-racism. Get to know Métis history and culture in BC. Avoid traditional colonization so that you have some cultural competence. It's not Indigenous teacher job to educate you. Be open with our own biases. I like self awareness and time to understand our own biases. Spend time considering your biases.

Sections: [Awareness and Understanding](#); [Learning and Education](#)

Setting goals for our engagement work proactively and collaboratively

Beyond Inclusion: Equity in Public Engagement



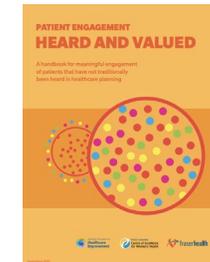
Section: [Principle 2 - Plan Early and Proactively](#)

Equity in Engagement Framework



Sections: [Step 2 - Plan Collaboratively with Partners](#); [Step 3 - Develop Engagement Approach](#)

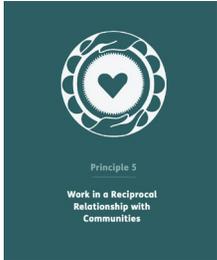
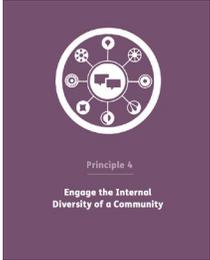
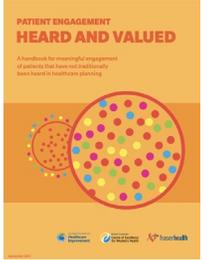
Patient Engagement Heard and Valued



Section: [4.1 - Engaging around issues that matter to patients: who has the power to set the agenda](#)

How do we connect with our population for engagement?

Equipped with an understanding of who your population is and why you wish to engage with them, you will need to consider how to connect with them. This involves establishing trust, ensuring you reach diverse voices, and reducing barriers.

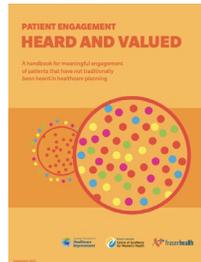
<p>Establishing trust and meaningful relationships</p>	<p>Beyond Inclusion: Equity in Public Engagement</p>  <p>Section: Principle 5: Work in a Reciprocal Relationship with Communities</p>	<p>Let's Talk: Community Engagement for Health Equity</p>  <p>Section: Build Trust First</p>
<p>Reaching diverse voices</p>	<p>Beyond Inclusion: Equity in Public Engagement</p>  <p>Section: Principle 4 - Engage the Internal Diversity of a Community</p>	<p>Recruiting for Diversity</p>  <p>Section: Recruiting for Diversity</p>
<p>Reducing barriers to engagement</p>	<p>Beyond Inclusion: Equity in Public Engagement</p>  <p>Section: Section 3 - Scoping Projects for Inclusion and Accessibility</p>	<p>Patient Engagement Heard and Valued</p>  <p>Section: 4.4 - Reducing the barriers that prevent people from attending patient engagement</p> <p>Making Space: Centering Equity in Planning</p>  <p>Section: Mapping and Goal Setting Worksheet</p>

What engagement strategies can we use to foster equity?

Thinking about equity doesn't stop once you've connected with your population. Demonstrating an ongoing commitment to equity-centred principles throughout the engagement process requires ensuring your participants feel safe, respected, and valued, while simultaneously addressing power imbalances that may arise.

Ensuring participants feel safe, respected, and valued

Patient Engagement Heard and Valued



Section: [4.6 - Supporting meaningful participation & avoiding the practices that silence people](#)

Let's Talk: Community Engagement for Health Equity



Section: [Use Language That Values Community](#)

Making Space: Centering Equity in Planning



Section: [Flipping Orthodoxies Worksheet](#)

Addressing power imbalances

Let's Talk: Community Engagement for Health Equity



Section: [Share Power With Communities](#)

Beyond Inclusion: Equity in Public Engagement



Section: [Decentering Engagement & Case Study](#)

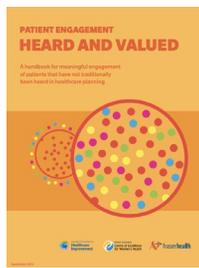
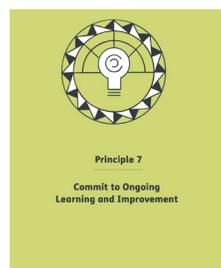
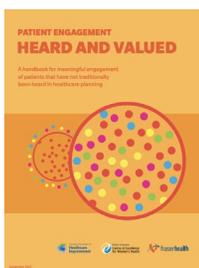
Making Space: Centering Equity in Planning



Section: [Co-Creation for Power Sharing Worksheet](#)

How will we continue to foster equity after engagement is complete?

After you have completed an engagement activity, further work must be done to uphold the principles of equity. This includes following-up with participants, acting on their input, and committing to learning and improving your engagement work.

<p>Acting on participant input and following-up</p>	<p>Equity in Engagement Framework</p>  <p>Sections: Step 5 - Use Engagement Feedback; Step 6 - Communicate and Evaluate Impact</p>	<p>Patient Engagement Heard and Valued</p>  <p>Section: 4.9 - Incorporating patient engagement into planning</p>	<p>Beyond Inclusion: Equity in Public Engagement</p> <p>Reporting What We Heard</p> <p>What We Heard reports are increasingly becoming a staple in public engagement initiatives to support transparency and accountability. What We Heard reports typically:</p> <ul style="list-style-type: none"> • Outline the outreach and engagement process • Summarize community recommendations and next steps • "Close the loop" with participants by explaining how their input contributed to decisions <p>Section: Reporting What We Heard</p>
<p>Ongoing learning and improvement</p>	<p>Beyond Inclusion: Equity in Public Engagement</p>  <p>Section: Principle 7 - Commit to Ongoing Learning and Improvement</p>	<p>Patient Engagement Heard and Valued</p>  <p>Section: 5. Evaluation</p>	

References

- BC Patient Safety & Quality Council. (2021). *Culturally Safe Engagement: What Matters to Indigenous (First Nations, Métis and Inuit) Patient Partners?* https://bcpsqc.ca/wp-content/uploads/2022/03/Culturally-Safe-Engagement-Companion-Guide_Final.pdf
- BC SUPPORT Unit. (n.d.). *Methods for Supporting Diverse Patient Engagement in a Diverse World: The BC SUPPORT Unit Tapestry Project.* <https://diversity-tapestry.com/tapestry/bc-support-unit-tapestry-project/>
- Boilevin, L., Chapman, J., Deane, L., Doerksen, C., Fresz, G., Joe, D., Leech-Crier, N., Marsh, S., McLeod, J., Neufeld, S., Pham, S., Shaver, L., Smith, P., Steward, M., Wilson, D., & Winter, P. (2019). *Research 101: A Manifesto for Ethical Research in the Downtown Eastside.* The University of British Columbia. <https://open.library.ubc.ca/media/stream/pdf/52387/1.0377565/5>
- Fraser Health. (2013). *Patient Engagement Heard and Valued.* https://www.cfhi-fcass.ca/docs/default-source/itr/pe-hub/awesome_handbook-fraserhealth.pdf
- Health Quality Ontario. (2017). *Recruiting for Diversity.* <https://www.hqontario.ca/Portals/0/documents/pe/recruiting-diversity-en.pdf>
- National Collaborating Centre for Determinants of Health. (2021). *Let's Talk: Community Engagement for Health Equity.* <https://nccdh.ca/images/uploads/comments/Lets-Talk-Community-Engagement-EN.pdf>
- Ontario Health. (n.d.). *Equity in Engagement Framework.* <https://www.ccohealth.ca/sites/CCOHealth/files/assets/EngagementFramework.pdf>
- Ontario SPOR SUPPORT Unit. (2022). *Fairness is Excellence: The Ontario SPOR SUPPORT Unit's Equity Framework.* https://ossu.ca/wp-content/uploads/OSSU-Equity-Framework_English.pdf
- Patient Voices Network, BC Patient Safety & Quality Council. (n.d.). *Diversity, Equity & Inclusion Elevating the Voices of All in British Columbia.* <https://patientvoicesbc.ca/wp-content/uploads/2021/12/Diversity-Equity-Inclusion-Elevating-the-Voices-of-All-British-Columbian.pdf>
- Research Ethics BC & First Nations Health Authority. (2020). *Culturally Safe and Trauma-Informed Practices for Researchers during COVID-19.* <https://www.bcahsn.ca/sites/default/files/2021-06/Culturally%20Safe%20and%20Trauma-Informed%20Practices%20for%20Researchers%20during%20COVID-19.pdf>
- Simon Fraser University's Morris J. Wosk Centre for Dialogue. (2020). *Beyond Inclusion: Equity in Public Engagement, A Guide for Practitioners.* <https://www.sfu.ca/content/dam/sfu/dialogue/ImagesAndFiles/ProgramsPage/EDI/BeyondInclusion/Beyond%20Inclusion%20-%20Equity%20in%20Public%20Engagement.pdf>
- Wellesley Institute, City of Toronto, Monumental, & And Also Too. (2021). *Resources. Making Space: Centering Equity in Planning.* <https://making-space.city/resources>

Appendix A: Quick Reference Guide of Resources for Equity-centred Engagement

Background resources: Covers important background information such as the definitions of EDI and related terms and their importance in engagement work, or guiding principles to support the equitable inclusion of diverse voices in engagement work

How to guides: Takes a practical, action-oriented approach to the operationalizing of one or more EDI principles in the design, implementation and/or evaluation of engagement work

Comprehensive tools: Covers important background information such as the definition of EDI and related terms and their importance in engagement work, or guiding principles to support the equitable inclusion of diverse voices in PE and offers practical strategies and actionable steps for operationalizing one or more elements of EDI in the design, implementation and/or evaluation of engagement work

Indigenous focused resources

CATEGORY	TITLE	SOURCE	RESOURCE TYPE	KEY ELEMENTS	MOST VALUABLE FEATURE	KEEP IN MIND!
BACKGROUND RESOURCES	Diversity, Equity & Inclusion Elevating the Voices of All in British Columbia (n.d.)	Patient Voices Network, BC Patient Safety and Quality Council	PDF	<ul style="list-style-type: none"> Defines equity, diversity, inclusion, cultural safety, cultural humility Offers some important considerations that ensure EDI is championed in patient engagement 	Encourages personal and organizational reflection regarding knowledge of and commitment to EDI	
	Methods for Supporting Diverse Patient Engagement (2022)	BC Academic Health Sciences Network	Website (video-based modules)	<ul style="list-style-type: none"> Offers a primer on diversity in patient-engaged research, explaining the importance of diversity, the role of power, positionality, and intersecting oppressions Offers steps to move forward, including overcoming barriers to diversity and fostering long-term diversity 	Focus on specific populations: Deaf/HoH, disabled, 2SLTGBQ+, immigrant/ refugee/ racialized/ ethnocultural, rural and remote populations	Platform may be a bit difficult to navigate but the tool offers a guide on how to navigate platform

	Let's Talk: Community Engagement for Health Equity (2021)	National Collaborating Centre for Determinants of Health	PDF	<ul style="list-style-type: none"> • Discusses the importance of authentic community engagement for health equity • Explains 5 key practises for conducting authentic community engagement 	Offers key considerations for acknowledging power imbalances and power-sharing	
	Fairness is Excellence: The Ontario SPOR SUPPORT Unit's Equity Framework (2022)	Ontario SPOR Support Unit	PDF	<ul style="list-style-type: none"> • Offers principles and practices for promoting equity in patient-oriented research • Describes how equity can be fostered in forming research teams, designing and conducting research studies, and disseminating findings 	Explains how equity can be promoted throughout the entire research process and discusses the role of engagement in promoting equity	
	Research 101: A Manifesto for Ethical Research in the Downtown Eastside (2019)	Various DTES Community Organizations	PDF	<ul style="list-style-type: none"> • Describes key expectations that community organizations in Vancouver's Downtown Eastside have of researchers in their community • Includes expectations around identifying the positions and motivations of the researchers, navigating ethical issues, supporting peer researchers, and engaging in reciprocity 	Offers a very strong community voice with specific actions that may be important to consider when working in various marginalized communities	

HOW-TO GUIDES	Recruiting for Diversity (2017)	Health Quality Ontario	PDF	<ul style="list-style-type: none"> Explains why diversity matters in patient and family advisory councils Offers steps to help ensure diverse representation on patient and family advisory councils, supported by case examples 	Offers important actionable steps and practical tools to ensure diverse representation on patient and family advisory councils	
	Equity in Engagement Framework (n.d).	Ontario Health	PDF	<ul style="list-style-type: none"> Describes how to foster an organizational culture of equitable engagement Presents 6 high level steps involved in the engagement process and how equity can be prioritized at each step Provides considerations for working with specific populations 	Offers important actionable steps for fostering equity throughout the engagement process, with case examples to help tailor the engagement process for specific populations (LGBTQ+, newcomers, youth)	
	Making Space: Centering Equity in Planning (2021)	Making Space	Website	<ul style="list-style-type: none"> Offers 5 “How-to” sections for making engagement processes more equitable Worksheets + case studies to support putting these aspects in action 	Provides several worksheets that thoroughly walk you through key steps in planning engagement activities	Not specific to health, but ideas and tools are relevant
COMPREHENSIVE TOOLS	Beyond Inclusion: Equity in Public Engagement, A Guide for Practitioners (2020)	Simon Fraser University Morris J. Wosk Centre for Dialogue	PDF	<ul style="list-style-type: none"> Defines EDI terms and explains importance of inclusion and equity in engagement Provides guiding principles (supplemented with case studies) to support equitable inclusion of diverse voices in PE and promote co-creation of solutions 	Describes practical strategies to promote equity in engagement, developed through a participatory research and consultation process	

	Patient Engagement Heard and Valued (2013)	Canadian Foundation for Healthcare Improvement	PDF	<ul style="list-style-type: none"> • Provides considerations for conducting patient engagement in an inclusive way, focusing on voices who have not traditionally been heard empowering, and meaningful way • Spans entire engagement process, including planning, implementation, and evaluation 	Section on why status quo isn't working critiques traditional approaches to engagement and highlights the why we must engage marginalized populations	Very long, text-heavy document
INDIGENOUS FOCUSED RESOURCES	Culturally Safe Engagement: What Matters to Indigenous (First Nations, Métis and Inuit) Patient Partners? (2021)	Patient Voices Network, BC Patient Safety and Quality Council	PDF	<ul style="list-style-type: none"> • Focuses on cultural safety and cultural humility lenses in engagement approaches • Provides specific principles to embed in engagement 	Engaged Indigenous patient partners and incorporates their voices and what matters to them in engagement	
	Culturally Safe and Trauma-Informed Practices for Researchers during COVID-19 (2020)	BC Academic Health Sciences Network	PDF	<ul style="list-style-type: none"> • Offers important ideas and practises to consider in relationship building • Offer some practical ideas to promote trauma-informed practise 	Includes historical and current context for practitioners who may not be as knowledgeable on Indigenous histories and realities	

Appendix B: Summary of Resources for Equity-centred Engagement



Diversity, Equity & Inclusion Elevating the Voices of All in British Columbia (n.d.)

Intended users: Practitioners in health systems or health policy

Purpose: To highlight the importance of EDI as an engagement best practise and provide important information to support patient engagement

Main focus: Defining key terms, presenting considerations to champion EDI when planning for engagement

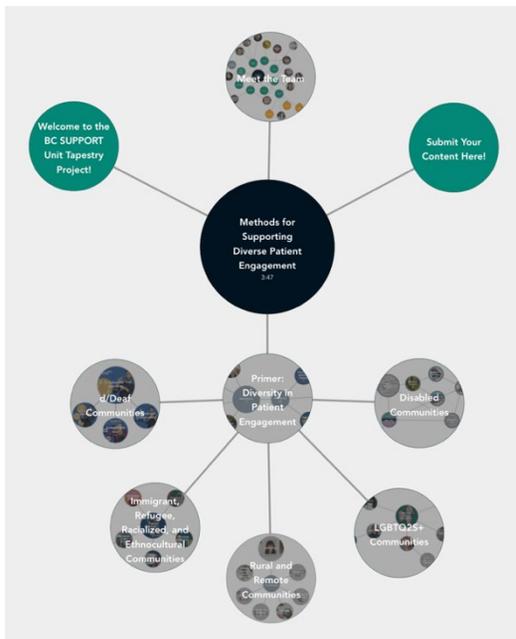
Who was involved in its development: Patient Voices Network health care and patient partners

How to use: Use when starting to think about engagement

Additional links: [Diversity, Equity and Inclusion in Patient Engagement Webinar](#)

Diversity, Equity & Inclusion

Elevating the Voices of All in British Columbia



Methods for Supporting Diverse Patient Engagement (2022)

Intended users: Researchers

Purpose: To help researchers engage diverse people in health research.

Main focus: Providing an overview of current knowledge and tools for supporting diverse patient engagement, presenting important considerations for engaging with Deaf/HoH, disabled, 2SLTGBQ+, immigrant/refugee/racialized/ethnocultural, and rural and remote populations

Who was involved in its development: Patient partners and academic from key populations

How to use: Use when starting to think about engagement in specific populations

Let's Talk: Community Engagement for Health Equity (2021)



LET'S TALK
COMMUNITY ENGAGEMENT
FOR HEALTH EQUITY

PART OF THE LET'S TALK SERIES

Intended users: Practitioners in health systems or policy

Purpose: To encourage a shift towards deeper levels of authentic engagement between public health and community members who live with inequities.

Main focus: Exploring 5 key practises for conducting authentic community engagement for health equity: Valuing engagement as core public health practice, Sharing power with communities, Building trust first, Codeveloping the structure and expectations of engagement, Using language that values community

Who was involved in its development: Unclear

How to use: Use to facilitate organizational discussions to reflect on current engagement practices and think about ways to share power with communities and establish organizational processes that prioritize health equities (See more in resource home page, section: "Use this resource to:")

Fairness is Excellence: The Ontario SPOR SUPPORT Unit's Equity Framework (2022)



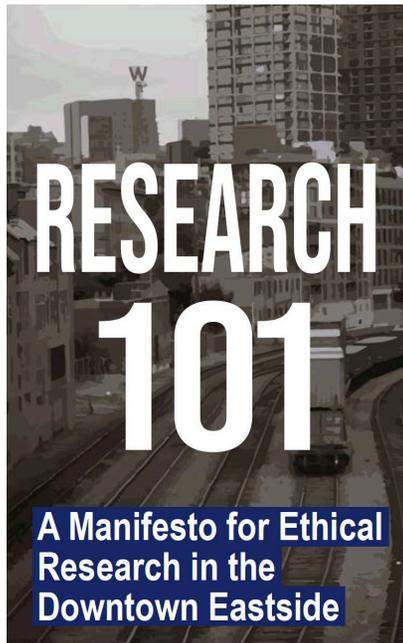
Intended users: Researchers

Purpose: To explain principles and practices for promoting equity in patient-oriented research

Main focus: Presenting key considerations for research teams to prioritize equity in planning and conducting patient-oriented research across all its stages, including choosing research topics, forming research teams, recruiting participants, collecting data, and disseminating findings

Who was involved in its development: Some community members

How to use: Use as guidelines with key considerations for planning research project



Research 101: A Manifesto for Ethical Research in the Downtown Eastside (2019)

Intended users: Researchers

Purpose: To clearly communicate to researchers the expectations that Downtown Eastside (DTES) community members have for research that is respectful, useful, and ethical in the DTES community

Main focus: Presenting key considerations when planning to engage with DTES community members/organizations

Who was involved in its development: Various Downtown Eastside community organizations

How to use: Use to reflect on the pitfalls and potentials of research on pages 6-7, reflect on and address questions presented on pages 10-25 when planning for engagement

Recruiting for Diversity (2017)



Intended users: Practitioners in health systems or policy

Purpose: To provide practical tips and tools to help address some of the challenges faced by patient and family advisory councils, and help you PFACs that reflects the diversity of the people that the organization serves and the broader community

Main focus: Offers very specific tips and actionable steps for planning and outreach for recruitment of diverse groups for engagement activities

Who was involved in its development: Patients and healthcare providers

How to use: Use to plan recruitment for engagement activities

Equity in Engagement Framework (n.d.)



Intended users: Practitioners in health systems or policy

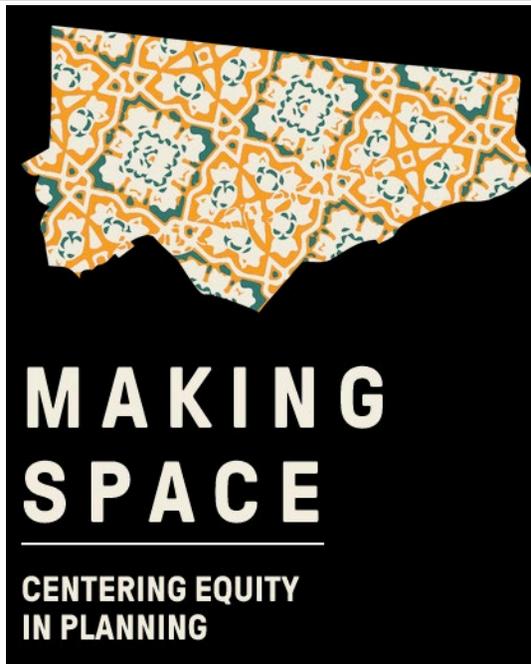
Purpose: To provide a framework to promote equitable engagement and tools to assist organizations to engage and connect with diverse marginalized populations in Ontario

Main focus: Providing overarching tips to prepare organizations and create a cultural of equitable engagement; Providing actionable steps to plan and implement engagement activities with a focus on equity

Who was involved in its development: Unclear

How to use: Use Section B as a step-by-step guide in planning and implementing engagement, and use Section C to help align engagement approaches to specific marginalized populations

Making Space: Centering Equity in Planning (2021)



Intended users: Practitioners in policy

Purpose: To offer a set of tools which will support more effective engagement with equity-deserving groups around spaces, policies and programs delivered by the City of Toronto

Main focus: Providing guidance on 5 key steps in planning or implementing in engagement: Setting goals and measuring impact, reaching a more diverse public, identifying paths to community ownership and power sharing, leading an equitable meeting, and communicating with communities

Who was involved in its development: Planners, community organizations, engagement professionals and City of Toronto staff

How to use: Identify relevant guides in How-To section, use related worksheet to plan engagement activities



Beyond Inclusion: Equity in Public Engagement, A Guide for Practitioners (2020)

Intended users: Practitioners in health systems or policy

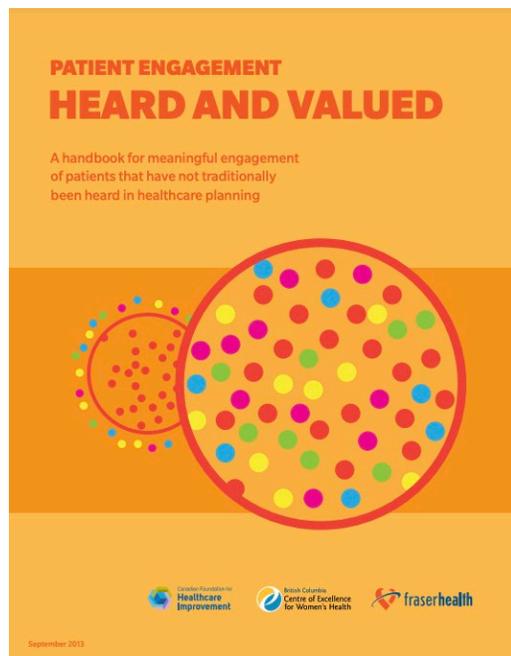
Purpose: To help public engagement practitioners explore what it would take to move beyond inclusion and towards a practice of equity

Main focus: Proposing 8 principles, with actionable steps that practitioners can take to ensure diverse voices are respected and centred in planning and implementation of engagement

Who was involved in its development: Community members, engagement practitioners, and representatives from governments and civil society

How to use: Use Section 1 for key background information, Section 2 to learn about the principles and key steps, Section 3 for strategies to address potential barriers to accessibility

Additional links: [Webinar](#)



Patient Engagement Heard and Valued (2013)

Intended users: Practitioners in health systems or policy

Purpose: To assist healthcare decision makers to plan, implement, and evaluate patient engagement processes with a focus on engaging patients whose voices have not traditionally been heard in healthcare planning

Main focus: Outlining the implications of excluding marginalized patients from patient engagement and identifying strategies to prevent and overcome these challenges

Who was involved in its development: Patients and health service planners and researchers

How to use: Use Section 3 for important background information and to consider potential challenges, use Section 4 for specific strategies to engage with helpful tips and case examples

Culturally Safe Engagement: What Matters to Indigenous (First Nations, Métis and Inuit) Patient Partners?

Companion Guide



Culturally Safe Engagement: What Matters to Indigenous (First Nations, Métis and Inuit) Patient Partners? (2021)

Intended users: Practitioners in health systems or policy

Purpose: To support health care partners to put cultural safety and humility into practice when engaging with Indigenous Peoples

Main focus: Providing specific principles to think through and embed in engagement work that can be used when planning or considering engaging with Indigenous populations

Who was involved in its development: Indigenous patient partners and healthcare partners

How to use: Consider principles, recommendations, and actions when planning engagement

Additional links: [At-a-glance resource](#)



BC AHSN

British Columbia
Academic Health Science Network



Michael Smith

**Health
Research BC**

Culturally Safe and Trauma-Informed Practices for Researchers during COVID-19 (2020)

Intended users: Researchers

Purpose: To explain how to take a culturally safe, trauma-informed approach to working with First Nations

Main focus: Offering considerations for relationship building and community engagement, being guided by cultural safety and humility and trauma-informed practice, and conducting respectful research with First Nations Peoples and communities, particularly during COVID-19

Who was involved in its development: Unclear

How to use: Use for background information and key historical context and use for strategies to think about when considering engaging with First Nations Peoples

Appendix C: Methods

Objectives

The original objective of this project was to identify the public engagement tools that exist in Canada, assess this body of work and curate them in a resource guide to support engagement practitioners in conducting engagement activities that prioritize equity, as well as diversity and inclusion.

Literature Search

We conducted grey literature searches in June and July of 2022, using the following search terms:

"public engagement"		equity
"patient engagement"		diversity
"community engagement"		inclusion
"public involvement"		justice
"patient involvement"	AND	anti-oppression
"public inclusion"		trauma-informed
"patient inclusion"		EDI
"patient engaged"		
"community engaged"		

Among the search results, we sought out engagement resources or tools that discussed equity, diversity, inclusion, or related search terms and excluded those that did not have a specific focus on equity, diversity, inclusion, or related search terms. We focused on resources based in Canada and the Canadian context and excluded research or journal articles, focusing on resources that could be practical and easy to understand.

Assessment

We developed and fine-tuned 4 descriptive categories to assess each resource, each with a set of criteria:

Comprehensiveness	Ease of Understanding	Functionality	Engagement
Are EDI terms explained?	# pages	How can this resource be used?	Were patients/public/ communities engaged in the development of the resource? If yes, who, and how?
Is the importance of EDI in engagement discussed?	Is the information presented in a visually clear or appealing way?	What practical tools are provided?	Is their involvement described in the resource?
Does the resource meet its objective?	How easy to understand are the language and concepts use		

We assessed 35 resources across the 4 criteria. In this assessment phase, we focused on identifying and describing what the resources could offer in relation to each category, rather than assigning values or grades to the resources. Each resource was reviewed by 2 reviewers, and reviewer discussions resulted in 12 resources that were chosen to be included in the final resource guide. These 12 resources represent a core set of resources, based on a balance across the 4 criteria. This set of resources was compiled into a curated resource guide, which included a Quick Reference Guide (Appendix A) and a Resource Summaries document (Appendix B).

We conducted a focus group on September 22, 2022, with interested engagement practitioners to present this preliminary version of the curated resource guide and seek feedback on how it could be improved and be most useful to the engagement practitioner community. We asked the following questions:

- Is this type of resource guide useful to your work/organization?
 - What elements of this resource guide are most useful to you?
 - How do you see yourself using this resource guide?
- What do you see as some of the barriers to using this resource guide? How might we address these barriers?
- What format do you recommend we use to share this resource guide with relevant groups/organizations to ensure its uptake/use?
- Are there other barriers to prioritizing EDI in engagement that are not included in this guide?

From this focus group, we heard that the guide should present sufficient context for individuals to begin to do engagement work, including emphasizing the importance of understanding one's role in the engagement process, and the need to carefully think about the populations one wishes to engage with. As well, attendees suggested presenting information how each resource could be used at different stages of the engagement process. This feedback motivated the creation of the Supporting Equity-centred Engagement Guide.