

Organisational Self-Assessment and Planning Tool for Consumer and Community Participation

A tool for organisations involved in
health policy and education

Version 1.0

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TABLE OF CONTENTS

PAGE NO:

ACKNOWLEDGEMENTS	1
INTRODUCTION	2
<i>What is the Organisational Self-Assessment and Planning Tool for Consumer and Community Participation</i>	<i>2</i>
<i>How can consumers and communities participate?.....</i>	<i>2</i>
<i>Why involve consumers and communities?</i>	<i>3</i>
<i>What is the usefulness of the Organisational Self-Assessment and Planning Tool for Consumer and Community Participation?</i>	<i>4</i>
<i>What are the steps involved in using the Organisational Self-Assessment and Planning Tool for Consumer and Community Participation?</i>	<i>5</i>
<i>How is the Organisational Self-Assessment and Planning Tool for Consumer and Community Participation designed to be used?.....</i>	<i>5</i>
DEFINITION OF TERMS	8
LEVELS OF PARTICIPATION	9
ORGANISATION - DEFINITIONS AND AIMS	10
AREA 1 - GOVERNMENT, STRATEGIC PLANNING, POLICIES	13
AREA 2 - OPERATIONS	17
AREA 3 - EDUCATION/TRAINING, EVALUATION	22
NEXT STEP	26
NOTES	27
USEFUL RESOURCES.....	28
REFERENCES CITED	31
REFERENCES USED.....	32
CONTACT DETAILS	33

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INTRODUCTION

The *Organisational Self-Assessment and Planning Tool for Consumer and Community Participation* (henceforth referred to as “the OSAP Tool”) is designed to assist organisations to determine their commitment and capacity regarding consumer and community participation, and to identify areas of practice that could benefit from consumer participation.

What is the Organisational Self-Assessment and Planning Tool for Consumer and Community Participation?

The OSAP Tool is aimed at organisations that are involved in health policy and education (but do not provide direct services). We envisage that these organisations will include Divisions of General Practice, community organisations, peak bodies, policy-makers, and health education providers. Many of these organisations are aiming to become more consumer-focussed and consumer-friendly. Consumer participation is being encouraged and in some cases mandated by Commonwealth, State and Territory governments. In addition, non-government organisations that are publicly funded, or that work with other publicly-funded organisations, are accountable to consumers and/or communities.

Health organisations wanting to assess their consumer and community participation in direct service delivery should refer to the *Primary Care Self Assessment Tool for Community and Consumer Participation V1.0* (National Resource Centre for Consumer Participation in Health, 2002), which was developed specifically for providers of primary health services.

How can consumers and communities participate?

Consumer and community participation in health organisations can refer to the involvement of individual consumers, potential consumers, groups of consumers, community organisations, carers and family members of consumers, and community members who are potential health service users or who benefit from health care services.

From the perspective of non-direct service provision, health organisations can engage consumers, carers, and community members in a wide variety of organisational processes and activities that can affect the lives of consumers and the experiences of communities. Such organisational processes can include:

- organisational planning;
- policy development;
- resource allocation and development;
- project management;
- quality improvement and accreditation activities;
- research activities; and
- education and training of health professionals and other workers improving the quality of the services delivered by health professionals and other workers.

Health organisations can assess and develop their consumer and community participation at multiple levels within their organisations and health-related processes:

- at the organisational level – for example, needs assessment, strategic and business planning, and decision-making at all levels of the organisation;
- at the program level – for example, planning, implementation and evaluation activities associated with specific programs;
- at the health service level - while health organisations may not provide direct services, they often work with/for direct service providers and influence the delivery of health services to end-users; and
- at the health system level – for example, co-ordinating/advising on the delivery of health services.

Why involve consumers and communities?

Actively involving consumers and engaging communities can help health organisations to develop, implement, and evaluate their health strategies and programs.

Specifically, the advantages of consumer and community participation for organisations involved in health policy and education can include:

For the organisation itself –

- involving consumers and engaging communities with diverse backgrounds representing local needs or the needs of key target groups;
- obtaining consensus between what the organisation knows and what consumers/communities know;
- having a stronger voice in the community and health-care system and a greater chance of affecting change;
- implementing Government directives for consumer and/or community participation policies;
- more consumer/community-relevant policies, and allocation of resources in areas that matter to consumers/communities;
- a public policy that better meets the needs of the community, and better use of public funds;
- enhancing quality improvement in relation to development, implementation, and evaluation of policy and programs;
- ensuring consumer and community participation in accreditation processes.

For the organisation's membership and/or users of core business (i.e., general practices within the Divisions of General Practice), direct service providers, and supporting agencies –

- a better understanding of the users of services;
- increased responsiveness to consumer/community needs and issues.

For local communities and/or consumers sharing the same health condition or experience:

- improved quality of health care and health outcomes;
- increased control over the health services.

What is the usefulness of the Organisational Self-Assessment and Planning Tool for Consumer and Community Participation?

The OSAP Tool is designed to be a highly practical way to assist your organisation to improve consumer and community participation policies and practice. Effective consumer and community participation involves more than recruiting representatives to committees. The OSAP Tool can assist your organisation to identify a broad range of opportunities for participation; it can be used to assess and develop your organisation's commitment and capacity to involve and support consumers and communities in a range of planning, implementation, and evaluation activities.

The OSAP Tool can be used within a quality improvement process by helping your organisation to:

- map its current activities in consumer and community participation;
- identify the goals and proposed outcomes for community and consumer participation; and
- identify the actions needed in relation to community and consumer participation.

The OSAP Tool enables you to examine the consumer and community participation activities undertaken within your organisation across a range of different activities. The OSAP Tool focuses on three main areas of organisational functioning:

- (1) governance, strategic planning, policies;
- (2) operations; and
- (3) education/ training, and evaluation.

Through completing the OSAP Tool it is possible for your organisation to identify ways to engage in best practice for consumer and community participation, whereby:

- consumers and community members participate at many decision-making levels throughout the organisation;
- consumers and the community are involved throughout the planning, implementation and evaluation phases of organisational activities;
- management and staff at all levels understand the role of consumers and communities, and actively support the development and implementation of a comprehensive consumer participation strategy;
- there are adequate resources, plans and structures in place to support the participation process and use the information obtained from consumers and communities;
- the consumer and community members who participate are treated with respect and trust; their expertise, skills, and input is valued; and they receive appropriate training and support, and payment and financial assistance; and

- processes for involving consumers and communities and the outcomes of participation are evaluated by staff, consumers, and communities.

What are the steps involved in using the Organisational Self-Assessment and Planning Tool for Consumer and Community Participation?

First, the OSAP Tool assists your organisation to identify its consumers/community, and also to identify its aims in relation to consumer and community participation.

Next, the OSAP Tool prompts your organisation to answer three key questions:

1. What is the organisation currently doing to support consumer and community participation?
2. What does the organisation plan to achieve in relation to consumer and community participation?
3. What steps will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation?

By answering these questions your organisation can identify its commitment and capacity for consumer and community participation. Your organisation can then identify the issues, barriers and enablers it is likely to face when implementing consumer and community participation strategies. In answering these questions your organisation identifies current and desired levels of consumer and community participation.

How is the Organisational Self-Assessment and Planning Tool for Consumer and Community Participation designed to be used?

The OSAP Tool is designed to be used in whichever manner is most beneficial to your organisation. The OSAP Tool can be completed electronically or in hard copy format (with multiple copies where necessary). The OSAP Tool can be used by a range of staff within your organisation. Here are some suggestions:

- a single staff member or several key staff members could complete the OSAP Tool individually or as a group;
- a single staff member could interview a cross-section of key workers;
- convene a staff meeting to gather information and to plan for future activities;
- consumers and community members already participating in the organisation (e.g., consumer reference group) could complete the OSAP Tool; and
- consumers and community members could be invited to review information obtained by tool.

Remember that the information obtained will be influenced by the roles the respondents hold in your organisation and the range and number of staff and consumers who contribute information. To obtain detailed information and to enable planning and targeted action, it is important to obtain information from the management level of your organisation when completing to tool. However, the key here is to think about what would be most useful for your own organisation and tailor its use to your own needs.

The OSAP Tool is divided into two sections. The *first section* focuses on organisational definitions and aims, and the *second section* focuses on organisational functions.

SECTION 1: Organisational Definitions and Aims

This section (see pages 10-12) is designed to help you define who your organisation's consumers and community are, and for you to think about what you hope to achieve by engaging with consumers and the community. A *Definition of Terms for Consumer and Community Participation* on page 8 may help.

SECTION 2: Organisational Functions

This section (see pages 13-25) is arranged according to three areas of organisational functions. They are:

- (1)** governance, strategic planning, policies;
- (2)** operations; and
- (3)** education/ training, and evaluation.

Instructions for completing SECTION 2

Step 1 – Identify current activities, and goals/ proposed outcomes.

Activities have been identified for each area with space to describe current activities, and goals/ proposed outcomes.

These activities may or may not be relevant to your organisation. Where activities are currently not relevant to your organisation, your response will be to indicate “not appropriate” for these activities. As your organisation proceeds with the quality improvement process, some of these activities may later become relevant.

An “other” category has been included within each area, to enable your organisation to tailor the OSAP Tool to your own activities.

When describing your organisation's current and proposed activities and proposed outcomes/goals it can be helpful to consider the quality of the activities being undertaken. For example, you may want to continue an existing activity, but plan to extend its reach, improve the way it is done, or its effectiveness. You may find it more useful to describe activities, rather than simply provide a list.

Step 2 – Identify current and desired levels of participation.

The OSAP Tool contains a scale that can be used to identify the current and desired levels for consumer and community participation. This is explained in detail on page 9 and is a conceptual framework to determine where activities fit in a participation continuum.

When completing each question you could ask: “At what level are consumers and community members currently participating in our organisation? Is this the most

appropriate level?" There is space provided for you to indicate current and desired levels of participation.

Step 3 – Identify action(s) needed

Next, for each of the activities where you have identified the need for change, there is space to describe the action(s) needed to take the current level of consumer and community participation to proposed level.

When completing this section identify the steps needed to achieve the goals/ proposed outcomes, provide timelines, and identify who is responsible for the specific action.

After you have analysed the results for the range of specified activities, the OSAP Tool provides you with to space for you to take the next step and prioritise the actions that you have identified for your organisation (see page 26).

Step 4 – Use the information for planning and re-assessment

The information obtained in Steps 1 and 2 can be integrated into the Plan-Do-Study-Act (PDSA) cycle of the model of quality improvement to identify, implement, and evaluate changes. Accordingly, you might use the information obtained from the OSAP Tool to:

- **PLAN** – *Plan the action or change* from the information about goals/ proposed outcomes and action/s needed
- **DO** – *Carry out the plan* for action
- **STUDY** – *Study what was learned* by re-assessing the current activities, and comparing with the previous goals/ proposed outcomes; and by comparing the new current levels of participation with the previously obtained desired levels of participation
- **ACT** – *Determine modifications to be made* by re-identifying the action/s needed

This OSAP Tool can be used as part of the quality improvement process; some activities may be evaluated and changes enacted before your organisation moves on to other activities.

There are various ways for your organisation to complete sections of the OSAP Tool, and how you decide to do this may depend on your organisation's current consumer and community participation activities. Some organisations will be at the beginning phase, and others will have more well-established involvement with consumers and the community. It is possible that your organisation may simply map your current activities, or you may initially focus on one or two areas or activities. Some areas (i.e., Operations) may be easier to complete than others (i.e., Governance, Strategic Planning, Policies), particularly if your organisation is in the beginning phase of consumer and community participation. It may be useful to consider incorporating the completion of the OSAP Tool into your existing schedules for developing and monitoring organisational and business plans.

DEFINITION OF TERMS

The 'Organisational Self-Assessment and Planning Tool' uses terms such as 'consumer', 'consumer participation', 'consumer representative' and 'community'. It is understood these terms mean:

Term	Definition
Consumers	Those who use or are potential users of health services, including the family and carers of patients and clients. This includes those who may be directly or indirectly affected by health services. (Commonwealth Department of Health and Aged Care's Consumer Focus Collaboration, 1998:iv)
Consumer participation	The process of involving consumers in decision-making about their own health care, health service planning, policy development, setting priorities and addressing quality issues in the delivery of health services. (Consumer Focus Collaboration, 1998:iv)
Consumer representative	A committee member who voices the consumer perspective and takes part in the decision-making process on behalf of consumers. They are accountable to the organisation they represent and refer back to their constituency. (Consumer Focus Collaboration, 2000:4)
Community	A term that can be used in a variety of contexts. It can refer to a group of people in a geographical location, or a specific community or group of people with particular interests and values. (Consumer Focus Collaboration, 2000: 4)
Community involvement	Communities can be involved in their health care through: ... volunteering, self-help and self-help groups, control over services and decisions through empowerment strategies, community campaigns and coalitions, consultations, representation and advocacy. (National Health Strategy, 1993:7)
Carers	Carers ... usually family members who provide support to children or adults who have a disability, mental illness, chronic condition or who are frail aged. Carers can be parents, partners, brothers, sisters, friends or children. Some carers are eligible for government benefits while others are employed or have a private income. (Carers Australia, 2002).
Consumer and community groups	Groups that form around <i>local geographical interests</i> , generally in response to a single issue of local public concern. Groups that form among <i>people sharing the same health condition or experience</i> . Groups that are forged among <i>people with a shared experience of being harmed by a product</i> (or by people advocating a particular treatment or practice). Groups that <i>protest particular practices or developments on an ideological basis</i> . Population <i>groups with a shared identity</i> who come together to represent their concerns and interests. <i>Generic groups and coalitions</i> that are formed to advocate on behalf of the whole population. (Bastian, 1998: 11-12)

LEVELS OF PARTICIPATION

Consumers and community members can participate at many levels throughout the organisation, as illustrated in the table below. Specific practical examples to illustrate strategies for involving consumers and the community are given for each level of participation. Within the ladder of participation, a numeric score is attached to each level so that organisations can use this to easily describe the levels of their own activities. Higher degrees of participation do not necessarily denote more highly valued levels of participation. For example, in some instances, consulting with consumers and the community (*Level 2*) may be the most appropriate method of participation, depending on the organisational goals.

Degree	Participant's action	Illustrative mode
High ↑ 6	Have control	Organisation asks community to identify the problem and to make all the key decisions on goals and means. Willing to help community at each step to accomplish goals. <i>For example: Aboriginal Health Services, Community Health Services, Women's Health Services</i>
5	Have delegated	Organisation identifies and presents a problem to the community, defines the limits and asks community to make a series of decisions, which can be embodied in a plan it can accept. <i>For example: Working parties/groups</i>
4	Plan jointly	Organisation presents tentative plan subject to change and open to change from those affected. Expects to change plan at least slightly and perhaps more subsequently. <i>For example: Steering groups Partnerships to develop health information</i>
3	Advise	Organisation presents a plan and invites some feedback. Prepared to modify plan only if absolutely necessary. <i>For example: Consumer councils Consumer representatives on reference groups, or consumer reference group Consumer representatives on committees Patient forums Consumer consultative/advisory committees Consumer input on policy</i>
↓ 2 Low	Are consulted	Organisation tries to promote a plan. Seeks to develop support to facilitate acceptance of the plan. <i>For example: Evaluation surveys Focus groups Phone-ins Suggestion boxes Public meetings and forums</i>
1	Receive information	The Organisation develops a plan and announces it. The Community is informed. Endorsement of the plan is expected. <i>For example: Publications about how consumers can participate, patient charters, consumer-friendly administrative procedures, and the use of volunteers Newsletters Community meetings</i>
0	None	The Community is not involved.

Source: Modified from Brager and Specht (1973), in Consumer Focus Collaboration (2000a) Produced by the Department of Public Health, Flinders University, and the South Australia Community Health Research Unit, Commonwealth Department of Health and Aged Care, p.3.

CONSUMER AND COMMUNITY PARTICIPATION

ORGANISATION – DEFINITION AND AIMS

Date / s completed:	Completed by: <i>(Specify individuals and their roles in the organisation.)</i>	Contributions by: <i>Who else has provided information used in the tool?</i> <i>(Specify individuals and their roles in the organisation. Consider obtaining input from all levels of the organisation and consumers and community.)</i>	Method of completion: <i>How was the tool completed?</i> <i>(Specify consultation process such as group discussion, one-to-one interviews, or individuals completing separately.)</i>
In relation to your organisation, how do you describe the following?			
A. With respect to the organisation's core business, i) the users of core business ii) the key stakeholders.			
B. The organisation's consumers, consumer representatives, and communities. <i>(Refer to definition of Consumers and Community Participation Terms in Introduction. Consider the diversity of groups)</i>			

CONSUMER AND COMMUNITY PARTICIPATION

ORGANISATION – DEFINITION AND AIMS

In relation to your organisation, how do you describe the following?	
C. The roles and contributions of consumers and the community within the organisation.	
D. The potential benefits of consumer and community participation for the organisation at this point in time.	
E. The overall aims of consumer and community participation for the organisation.	

CONSUMER AND COMMUNITY PARTICIPATION

ORGANISATION – DEFINITION AND AIMS

In relation to your organisation, how do you describe the following?	
F. Aspects of the organisation's vision or mission statement incorporating consumer and community participation.	
G. The integration of consumers and the community within the organisational structure. <i>(Include organisational diagram if appropriate)</i>	

AREA 1 – GOVERNANCE, STRATEGIC PLANNING, POLICIES

CONSUMER AND COMMUNITY PARTICIPATION	Current activities	Goals/proposed outcomes	Level of Participation		Action(s) needed	
When considering governance, strategic planning, and policies, the range of activities related to consumer and community participation can include the following: <i>(Identify N/A as necessary)</i>	What is the organisation <u>currently</u> doing to support consumer and community participation in its governance, strategic planning, policies?	What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? <i>(Re: governance, strategic planning, policies)</i>	6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None		What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: governance, strategic planning, policies)</i>	By when/who
			Current	Proposed		
A. Organisational decision-making structures that include consumers and community members. <i>(For example, Board of Management, Reference Group, Advisory Committees, other structures)</i>						
B. Community members and consumers who participate in making key decisions at an organisational and/or project level.						

AREA 1 – GOVERNANCE, STRATEGIC PLANNING, POLICIES

CONSUMER AND COMMUNITY PARTICIPATION	Current activities	Goals/proposed outcomes	Level of Participation		Action(s) needed	
When considering governance, strategic planning, and policies, the range of activities related to consumer and community participation can include the following: <i>(Identify N/A as necessary)</i>	What is the organisation <u>currently</u> doing to support consumer and community participation in its governance, strategic planning, policies?	What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? <i>(Re: governance, strategic planning, policies)</i>	6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None		What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: governance, strategic planning, policies)</i>	By when/who
			Current	Proposed		
C. Communication mechanisms between the different organisational decision-making structures that enable reporting on consumer and community participation issues. <i>(Consider management/project/administration levels)</i>						
D. An organisational business/strategic plan that recognises and supports consumer and community participation.						

AREA 1 – GOVERNANCE, STRATEGIC PLANNING, POLICIES

CONSUMER AND COMMUNITY PARTICIPATION	Current activities	Goals/proposed outcomes	Level of Participation		Action(s) needed	
When considering governance, strategic planning, and policies, the range of activities related to consumer and community participation can include the following: <i>(Identify N/A as necessary)</i>	What is the organisation <u>currently</u> doing to support consumer and community participation in its governance, strategic planning, policies?	What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? <i>(Re: governance, strategic planning, policies)</i>	6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None		What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: governance, strategic planning, policies)</i>	By when/who
			Current	Proposed		
E. Specific organisational policies that relate to consumer and community participation. <i>(For example, consumer and community access to information about the organisation, consumer rights and responsibilities, involvement of marginalised groups)</i>						
F. Organisational policies that are developed with contributions from consumers and community.						

AREA 1 – GOVERNANCE, STRATEGIC PLANNING, POLICIES

CONSUMER AND COMMUNITY PARTICIPATION	Current activities	Goals / proposed outcomes	Level of Participation		Action(s) needed	
When considering governance, strategic planning, and policies, the range of activities related to consumer and community participation can include the following: <i>(Identify N/A as necessary)</i>	What is the organisation <u>currently</u> doing to support consumer and community participation in its governance, strategic planning, policies?	What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? <i>(Re: governance, strategic planning, policies)</i>	6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None		What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: governance, strategic planning, policies)</i>	By when/ who
			Current	Proposed		
G. Other <i>(define)</i> .						

AREA 2 – OPERATIONS

CONSUMER AND COMMUNITY PARTICIPATION	Current activities	Goals / proposed outcomes	Level of Participation		Action(s) needed	
When considering operations, the range of activities related to consumer and community participation can include the following: <i>(Identify N/A as necessary)</i>	What is the organisation <u>currently</u> doing to support consumer and community participation in its operations?	What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? <i>(Re: operations)</i>	6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None		What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: operations)</i>	By when/ who
A. Systems within the organisation that seek and consider consumer and community feedback. <i>(For example, through community consultations, surveys and workshops; input from 'special needs' or diverse groups)</i>			Current	Proposed		
B. Mechanisms that inform consumers and community groups about ways to participate in the organisation.						

AREA 2 – OPERATIONS

CONSUMER AND COMMUNITY PARTICIPATION	Current activities	Goals/proposed outcomes	Level of Participation		Action(s) needed	
When considering operations, the range of activities related to consumer and community participation can include the following: <i>(Identify N/A as necessary)</i>	What is the organisation <u>currently</u> doing to support consumer and community participation in its operations?	What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? <i>(Re: operations)</i>	6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None		What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: operations)</i>	By when/ who
			Current	Proposed		
C. Feedback mechanisms that facilitate information flow between the organisation and consumers and community members.						
D. A process that recognises the contribution of consumers and community members for their contributions to the organisation. <i>(For example, recognition in annual report, conference registration/attendance supported)</i>						

AREA 2 – OPERATIONS

CONSUMER AND COMMUNITY PARTICIPATION	Current activities	Goals / proposed outcomes	Level of Participation		Action(s) needed	
When considering operations, the range of activities related to consumer and community participation can include the following: <i>(Identify N/A as necessary)</i>	What is the organisation <u>currently</u> doing to support consumer and community participation in its operations?	What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? <i>(Re: operations)</i>	6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None		What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: operations)</i>	By when/ who
			Current	Proposed		
E. Financial plans that allocate sufficient resources to support consumer and community participation in the organisation. <i>(For example, funding to pay consumers for their involvement/ reimburse expenses/employ of consumers and community members with special expertise)</i>						
F. Staff position descriptions, and/or performance appraisal, that include criteria related to consumer and community participation in the organisation. <i>(For example, allocation of staff time to support consumer and community involvement)</i>						

AREA 2 – OPERATIONS

CONSUMER AND COMMUNITY PARTICIPATION	Current activities	Goals/proposed outcomes	Level of Participation		Action(s) needed	
When considering operations, the range of activities related to consumer and community participation can include the following: <i>(Identify N/A as necessary)</i>	What is the organisation <u>currently</u> doing to support consumer and community participation in its operations?	What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? <i>(Re: operations)</i>	6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None		What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: operations)</i>	By when/ who
			Current	Proposed		
G. Key staff and consumers who are identified to promote and support consumer and community participation within the organisation.						
H. Documented guidelines and procedures that support consumer and community participation within the organisation. <i>(For example, Terms of Reference for committee membership, recruitment procedures for consumer and community representatives)</i>						

AREA 2 – OPERATIONS

CONSUMER AND COMMUNITY PARTICIPATION	Current activities	Goals/proposed outcomes	Level of Participation		Action(s) needed	
When considering operations, the range of activities related to consumer and community participation can include the following: <i>(Identify N/A as necessary)</i>	What is the organisation <u>currently</u> doing to support consumer and community participation in its operations?	What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? <i>(Re: operations)</i>	6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None		What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: operations)</i>	By when/ who
			Current	Proposed		
I. Other <i>(define)</i> .						

AREA 3 - EDUCATION/TRAINING, EVALUATION

CONSUMER AND COMMUNITY PARTICIPATION	Current activities	Goals/proposed outcomes	Level of Participation		Action(s) needed	
When considering education /training and evaluation the range of activities related to consumer and community participation can include the following: <i>Note. Consider staff, consumers, community, users of core business, stakeholders when thinking about the organisation. (Identify N/A as necessary.)</i>	What is the organisation <u>currently</u> doing to support consumer and community participation in its education and training?	What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? (Re: education and training)	6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None		What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? (Re: education and training)	By when/ who
			Current	Proposed		
A. Initial and ongoing support for consumers and community representatives to enhance their participation within the organisation. <i>(For example, program to orientate representatives to organisation, education and training by external providers, access to support from other consumers)</i>						
B. Mechanisms that involve consumers and community representatives in conducting educational and training activities within the organisation. <i>(For example, developing training resources and program, delivering training, evaluating training programs. Consider education and training for staff at all levels of the organisation.)</i>						

AREA 3 - EDUCATION/TRAINING, EVALUATION

CONSUMER AND COMMUNITY PARTICIPATION	Current activities	Goals/proposed outcomes	Level of Participation		Action(s) needed	
When considering education/training and evaluation the range of activities related to consumer and community participation can include the following: <i>Note. Consider staff, consumers, community, users of core business, stakeholders when thinking about the organisation. (Identify N/A as necessary.)</i>	What is the organisation <u>currently</u> doing to support consumer and community participation in its education and training?	What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? (Re: education and training)	6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None		What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? (Re: education and training)	By when/who
			Current	Proposed		
C. Strategies that prepare the organisation to address issues related to involving <u>special</u> groups. <i>(Consider marginalised consumer groups, culturally and linguistically diverse groups)</i>						
D. A strategy that assists the organisation to evaluate the effectiveness of its consumer and community participation activities. <i>(For example, against stated aims, consumer satisfaction)</i>						

AREA 3 - EDUCATION/TRAINING, EVALUATION

CONSUMER AND COMMUNITY PARTICIPATION	Current activities	Goals / proposed outcomes	Level of Participation		Action(s) needed	
When considering education /training and evaluation the range of activities related to consumer and community participation can include the following: <i>Note. Consider staff, consumers, community, users of core business, stakeholders when thinking about the organisation. (Identify N/A as necessary.)</i>	What is the organisation <u>currently</u> doing to support consumer and community participation in its education and training?	What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? (Re: education and training)	6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None		What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? (Re: education and training)	By when/ who
			Current	Proposed		
E. Strategies that involve consumers and community representatives in the organisation's evaluation and accreditation activities. <i>(For example, designing, implementing, and interpreting the evaluation)</i>						
F. A plan for the use of evaluation results for organisational change.						

AREA 3 - EDUCATION/TRAINING, EVALUATION

CONSUMER AND COMMUNITY PARTICIPATION	Current activities	Goals/proposed outcomes	Level of Participation		Action(s) needed	
When considering education/training and evaluation the range of activities related to consumer and community participation can include the following: <i>Note. Consider staff, consumers, community, users of core business, stakeholders when thinking about the organisation. (Identify N/A as necessary.)</i>	What is the organisation <u>currently</u> doing to support consumer and community participation in its education and training?	What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? (Re: education and training)	6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None		What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? (Re: education and training)	By when/who
			Current	Proposed		
G. Other (define).						

NEXT STEP

After analysing the results, list the most important action items you have identified for your organisation:

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NOTES

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

USEFUL RESOURCES

There are many useful resources describing the benefits of consumer and community participation and strategies for increasing an organisation's commitment to involving consumers and the community.

A range of these resources on consumer and community participation can be downloaded from <http://participateinhealth.org.au> or obtained free of charge as hard copies from the National Resource Centre for Consumer Participation in Health.

The list of resources below relate to specific aspects of consumer and community participation likely to be encountered by health organisations involved in health policy and education.

Best Practice for Consumer Participation

- Commonwealth Department of Health and Aged Care (2001), *Consumer participation in accreditation* (2000), Produced by Enduring Solutions, A Consumer Focus Collaboration publication, Commonwealth Department of Health and Aged Care. **(See pages 22-23)**
- National Resource Centre for Consumer Participation in Health (2000), *Information Sheet: An introduction to consumer participation*, National Resource Centre for Consumer Participation in Health. **(See pages 4-5)**

Developing participation policies

- National Resource Centre for Consumer Participation in Health (2000), *Information Sheet No. 4: Questions to ask before involving consumers*, National Resource Centre for Consumer Participation in Health.
- National Resource Centre for Consumer Participation in Health (2000), *Information Sheet No. 6: Steps to develop a consumer participation strategy*, National Resource Centre for Consumer Participation in Health.
- Mental Health Council of Australia. *Consumer and carer participation policy template*. Information accessed from <http://www.mhca.com.au/docs/Policy%20Papers/NationalConsumerCarerPolicyTem.PDF> on 17 April 2003.
- Consumer Focus Collaboration (2000), *Improving health services through consumer participation: A resource guide for organisations*, Produced by the Department of Public Health, Flinders University, and the South Australian Community Health Research Unit, Commonwealth Department of Health and Aged Care. **(See pages 78-81; 143-144)**

Specific strategies for participation

- Consumer Focus Collaboration (2000), *Improving health services through consumer participation: A resource guide for organisations*, Produced by the Department of Public Health, Flinders University, and the South Australian Community Health Research Unit, Commonwealth Department of Health and Aged Care.
- National Resource Centre for Consumer Participation in Health (2000), *Information Sheet No. 2: Methods of consumer participation*, National Resource Centre for Consumer Participation in Health.

Ways to recruit consumers and community representatives

- National Resource Centre for Consumer Participation in Health (2000), *Information Sheet No. 3: Committees that involve consumers: Issues for service providers to consider*, National Resource Centre for Consumer Participation in Health. **(See page 3)**
- Commonwealth Department of Health and Aged Care (2001), *Consumer participation in accreditation* (2000), Produced by Enduring Solutions, A Consumer Focus Collaboration publication, Commonwealth Department of Health and Aged Care. **(See page 36)**
- Consumer Focus Collaboration (2000), *Improving health services through consumer participation: A resource guide for organisations*, Produced by the Department of Public Health, Flinders University, and the South Australian Community Health Research Unit, Commonwealth Department of Health and Aged Care. **(See pages 72-74)**

Evidence supporting consumer and community participation

- Consumer Focus Collaboration (2001) *The Evidence Supporting Consumer Participation in Health*, Commonwealth Department of Health and Aged Care.
- Consumer Focus Collaboration (2000), *Improving health services through consumer participation: A resource guide for organisations*, Produced by the Department of Public Health, Flinders University, and the South Australian Community Health Research Unit, Commonwealth Department of Health and Aged Care. **(See pages 1-2)**

Participation in committees

- National Resource Centre for Consumer Participation in Health (2000), *Information Sheet No. 3: Committees that involve consumers: Issues for service providers to consider*, National Resource Centre for Consumer Participation in Health.
- Consumer Focus Collaboration (2000), *Improving health services through consumer participation: A resource guide for organisations*, Produced by the Department of Public Health, Flinders University, and the South Australian Community Health Research Unit, Commonwealth Department of Health and Aged Care. **(See pages 67-68, 70-71)**

Participation in Divisions of General Practice

- National Resource Centre for Consumer Participation in Health (2000), *Consumer participation in Australian Divisions of General Practice: A Case study (June 2002)*, National Resource Centre for Consumer Participation in Health.
- General Practice Divisions Victoria. (2003), *Consumer – community connections and Divisions of General Practice*, Policy Issues Paper no, 20. Information accessed from <http://www.gpdv.com.au/> on 17 April 2003.

Participation in Primary Care

- National Resource Centre for Consumer Participation in Health (2002), *Primary Care Self Assessment Tool for Community and Consumer Participation, V1.0 (May 2002)*, National Resource Centre for Consumer Participation in Health.
- National Resource Centre for Consumer Participation in Health (2000), *Consumer participation in Australian Primary Care: A literature review (May 2002)*, National Resource Centre for Consumer Participation in Health.

Participation in accreditation

- Commonwealth Department of Health and Aged Care (2001), *Consumer participation in accreditation* (2000), Produced by Enduring Solutions, A Consumer Focus Collaboration publication, Commonwealth Department of Health and Aged Care.

Participation by marginalised groups

- Commonwealth Department of Health and Aged Care (2000), *Feedback, participation and consumer diversity: A literature review* (2000), Produced by the National Resource Centre for Consumer Participation in Health, A Consumer Focus Collaboration publication, Commonwealth Department of Health and Aged Care.

Education and training for representatives and staff

- Consumers' Health Forum of Australia (1999) 4th ed. *Guidelines for Consumer Representatives: Suggestions for Consumer or Community Representatives Working on Committees*, Consumers' Health Forum of Australia.
- Consumer Focus Collaboration (2000), *Education and training for consumer participation in health care: Resource guide*, Produced by Global Learning Services, A Consumer Focus Collaboration publication, Commonwealth Department of Health and Aged Care.
- Mental Health Council of Australia (2000), *Enhancing relationships between health professionals and consumers and carers – Final report*, Canberra, ACT. Commonwealth Department of Health and Aged Care.
- *Learning together: Education and training partnerships in Mental Health Service*. Final report, Prepared by Deakin Human Services Australia, with funding from the Commonwealth Department of Health and Aged Care under the National Mental Health Strategy, February, 1999.

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Carers Australia (2002) 'Who are carers?', Information accessed from http://www.carers.asn.au/aboutus.html#who_are_carers on 17 April 2003.

Consumer Focus Collaboration (1998) *Consumer Focus Collaboration Strategic Plan 1997-98-2000-01*, Commonwealth Department of Health and Aged Care.

Consumer Focus Collaboration (2000) *Improving health services through consumer participation: A resource guide for organisations*, Produced by the Department of Public Health, Flinders University, and the South Australian Community Health Research Unit, Commonwealth Department of Health and Aged Care.

Consumer Focus Collaboration (2001) *The Evidence Supporting Consumer Participation in Health*, Commonwealth Department of Health and Aged Care.

National Health Strategy (1993) *Healthy Participation: Achieving Greater Public Participation and Accountability in the Australian Health Care System*, Background Paper No. 12, National Health Strategy

National Resource Centre for Consumer Participation in Health (2002), *Primary Care Self Assessment Tool for Community and Consumer Participation*, V1.0 (May 2002), National Resource Centre for Consumer Participation in Health.

The following references were used in the development of the Organisational Self-Assessment and Planning Tool for Consumer and Community Participation.

Consumer Focus Collaboration (2000), *Improving health services through consumer participation: A resource guide for organisations*, Produced by the Department of Public Health, Flinders University, and the South Australian Community Health Research Unit, Commonwealth Department of Health and Aged Care.

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Draper, M. (1997), *Involving Consumers in Improving Hospital Care: Lessons from Australian Hospitals*, Royal Melbourne Institute of Technology, Commonwealth Department of Health and Family Services.

General Practice Divisions Victoria. (2003), *Consumer – community connections and Divisions of General Practice*, Policy Issues Paper no, 20. Information accessed from <http://www.gpdv.com.au/> on 17 April 2003.

Mental Health Council of Australia. *Consumer and carer participation policy template*. Information accessed from <http://www.mhca.com.au/docs/Policy%20Papers/NationalConsumerCarerPolicyTem.PDF> on 17 April 2003.

National Resource Centre for Consumer Participation in Health (2000), *Information Sheet No. 3: Committees that involve consumers: Issues for service providers to consider*, National Resource Centre for Consumer Participation in Health.

National Resource Centre for Consumer Participation in Health (2000), *Information Sheet No. 4: Questions to ask before involving consumers*, National Resource Centre for Consumer Participation in Health.

National Resource Centre for Consumer Participation in Health (2000), *Information Sheet: An introduction to consumer participation*, National Resource Centre for Consumer Participation in Health.

NSW Department of Health (2001), *The clinician's toolkit for improving patient care*, NSW Health Quality Branch, NSW Department of Health. Information accessed from <http://www.health.nsw.gov.au> on 17 April 2003.

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