*Insert your logo here*

**Project Managers who wish to engage with consumers**

**What should you consider?**

*Project managers play a critical role in supporting and enabling meaningful consumer engagement in projects. This relates both to individual practice as well as how consumers are supported and feel safe in their contribution and leadership.*

*For guidance and tips for your own consumer engagement practice, the following checklists assist you to integrate effective consumer engagement into a project and, in so doing, optimise outcomes.*

**How are consumers involved in your project(s)?**

* Consumer role(s) have been considered in project development, implementation and evaluation.
* There is strong leadership and support for consumer engagement in the project at all levels including the goal of appointing two consumers where committee roles are being considered.
* Each consumer representative role is clearly defined in a brief role description including: the nature of the work required; time commitment you anticipate it will require; duration of the role; the skills, interest and expertise you are seeking; and the support that the consumer can expect to receive.
* For committee roles, are there Terms of Reference for the committee in place to enable consumers (and all other members of the committee) to understand the scope and nature of their role.
* For consumers to be involved, have you thought about diversity and representation: Whose point of view to capture? What are other experiences or voices should you be drawing on and how?

**How do you support new consumers to participate effectively?**

* General orientation information is provided for consumers who are new to working with your organisation, such as:
  + Information providing an overview of the organisation (overview, vision, mission, links to a strategic plan).
  + Practical considerations: access to the building; parking; meeting locations; sitting fees that apply for this role as relevant; form for completion to enable reimbursement of expenses.
  + Your contact details.
  + Other key contacts, for example, Committee Chair, Group leader, Consumer Engagement Manager/Coordinator they may liaise with.
* Specific orientation information is provided for consumers who are new to working with your project(s):
  + Project overview.
  + Deciphering the jargon – list of common abbreviations, glossary of key terms.
  + Recommended background reading.
  + Upcoming learning opportunities relevant to the project. For example, symposia, conferences, seminars.
  + Prepared to answer any questions a consumer may ask about the project, objectives, committee membership, timeframes, expectations.
* Start by developing a working relationship:
  + Taking the time to get to know the consumer – hear their personal story, understand their professional background and interests, their experience in consumer roles, the competing priorities in their life that might influence their capacity to participate.
  + Asking them what they need to enable them to participate effectively in their role – training needs, conversations, communication preferences (email, phone), preferences for receiving documentation (mail, email, Dropbox), connection with consumer peers, flexibility re: hours of engagement.
  + Setting intentions on how to work together – what they can expect from you, what to expect from them.

**What ongoing support do you provide for consumers?**

* Briefing/checking in prior to meetings – any questions, items for clarification, concerns
* Debriefing after meetings – seeking feedback, items for clarifications, concerns
* Checking in periodically on:
  + Consumer-related workload and how they are managing. Discuss if additional support is required and even the potential for burnout. Encourage self-care and setting of boundaries to manage this.
  + Challenges experienced in their role as a consumer.
  + Learning, skill or development needs that have emerged.

**Is the contribution of consumers actively valued and acknowledged?**

* Routinely thanking them for their time, effort and expertise they bring to the project including recognition of the hours that a consumer will put in behind the scenes to participate.
* Encouraging them to apply for reimbursement of out-of-pocket expenses and sitting fees (if appropriate) to their role.
* Encourage the Project Lead and other members of the team to actively acknowledge the voluntary contribution of consumers to colleagues and express appreciation.
* Close the loop – let the consumers know the outcomes of initiatives that they have been asked to contribute to. Regular updates keep everyone engaged.

**Are you seeking feedback to improve your consumer engagement practice?**

* Routinely seek feedback on the value and contribution of consumers. What is working well, what is not working quite so well? What can be improved? Do they feel heard and respected? Are they treated as equal partners from:
  + Other consumers involved in the project
  + Team members
  + Chairs and senior team members
* Share any feedback received with the consumers.
* Identify and action improvements relevant to the working relationship.
* Share information and experiences colleagues.
* Seek input to address emerging issues and to design solutions to address them. This may be from a Consumer Engagement Manager/Coordinator, Consumer Advisory Committee, or Human Resources.