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| **Engaging People with Lived Experience: A Checklist** |
| Equity | Autonomy and Capacity Building | Ethical Considerations | Challenge Stereotypes and Assumptions | Key Expertise and Holistic Approach/Perspective |
| **Select column(s) and activities that apply** |
| **HOW?** | Program Delivery& Design | Evaluation | Research | Policy Development & Advocacy |
| Purpose  | [ ] Create programs and building that are client-centred, functional, and meet the needs and desires of clients..[ ]  Build capacity and foster a sense of empowerment and ownership for PWLE.[ ]  Build trust and confidence from clients. | [ ]  Identify what is and isn’t working through a holistic lens.[ ]  Measure program outcomes.[ ]  Improve programs to best meet client needs, expectations, and desires.[ ]  Obtain data that is more detailed and authoritative/relevant. | [ ]  Gain evidence-informed insights about social service programs/practices, and experiences of PWLE (e.g. benefits of peer support).[ ]  Create research questions that are meaningful to PWLE.[ ]  Identify assumptions and gaps in research. | [ ]  Create policies that account for the needs and perspective of PWLE.[ ]  Build capacity and foster a sense of empowerment for PWLE. |
| Methods | [ ]  Hire peer workers and PWLE (peer-led/designed programs).[ ]  Consultation through focus groups, surveys, and tenant meetings, preferably led by peer.[ ]  Establish a PWLE advisory committee or act as representatives in board/committees (min. 2 individuals). | [ ]  Employing a Participatory Evaluation Approach, work with PWLE on:* Defining markers of success that reflect PWLE’s perspectives.
* Creating evaluation questions.
* Determining/implementing data collection methods (e.g. surveys, interviews).
* Data Analysis and reporting findings (language, method).
* Planning and implementation of findings into practice.
 | [ ]  PWLE Develop and Conduct:* Interviews, Surveys, Focus Groups, or other activities.
* Data analysis.
* Establish recommendations.

[ ]  PWLE participate in focus groups, interviews, surveys. | [ ]  PWLE review and create policies as members of advisory committees or representatives in mixed committees (min. 2 individuals).[ ]  PWLE act as advocates or representatives at local/ national events.[ ]  PWLE have decision-making power (i.e. votes) in boards.[ ]  Integrate equity practices into organization policies. |
| Logistical Considerations | [ ]  Compensation (e.g. honorarium, salary).[ ]  Accessibility (time, location, transportation requirements).[ ]  Communication strategy (e.g. among advisory committee).[ ]  Training for peer workers. | [ ]  Compensation (e.g. honorarium, salary).[ ]  Accessibility (time, location, transportation requirements).[ ]  Training for PWLE on evaluation methods. | [ ]  Training for PWLE on research ethics and methods.[ ]  Accessibility (time, location, transportation requirements).[ ]  Recruitment for participants/collaborators (word of mouth, peer workers, posters).[ ]  Compensation for collaborators (e.g. honorarium, salary).[ ]  Provide necessary resources (recording device, computer).  | [ ]  Accessibility (time, location, transportation requirements).[ ]  Compensation (e.g. honorarium, salary).[ ]  Communication strategy (e.g. among advisory committee).[ ]  Training on advocacy, participation practices of boards/committees, and other skills necessary to effectively engage (both PWLE and staff).  |
| Ethics | [ ] Together with PWLE, establish guidelines for engagement among stakeholders.[ ]  Define roles clearly (with input from PWLE).[ ]  Offer Supports where necessary (e.g. support worker).[ ]  Ensure continuous/regular engagement.[ ]  Training for staff and other stakeholders on working together with PWLE (peer work integration, anti-oppression practices). | [ ]  Training for other evaluators on working together with PWLE (anti-oppression practices).[ ]  Define roles clearly (with input from PWLE).[ ]  Together with PWLE, establish guidelines for engagement and decision making among stakeholders.[ ]  Maintain confidentiality and seek informed consent. | [ ]  Maintain confidentiality and seek informed consent.[ ]  Establish boundaries between researcher and participants, or other stakeholders (guidelines for engagement).[ ]  Offer supports where necessary (e.g. support worker).[ ]  Ensure questions are within the scope of the project and not deeply personal or emotionally triggering (participants can opt out of answering).  | [ ]  Together with PWLE, establish guidelines for engagement and decision-making among stakeholders.[ ]  Offer supports where necessary (e.g. support worker).[ ]  Define roles clearly (with input from PWLE).[ ]  Ensure PWLE’s voices are heard on a continuous basis (anti-oppression strategies). |

Sources:

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