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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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