

ORGANISATIONAL SELF ASSESSMENT & PLANNING TOOL FOR CONSUMER & COMMUNITY PARTICIPATION

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.

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<p align="center">ORGANISATIONAL SELF ASSESSMENT & PLANNING TOOL FOR CONSUMER AND COMMUNITY PARTICIPATION¹</p> <p align="center">ORGANISATION – DEFINITION AND AIMS</p>			
<p>Date/s completed:</p>	<p>Completed by: <i>(Specify individuals and their roles in the organisation.)</i></p>	<p>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></p>	<p>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></p>
In relation to your organisation, how do you describe the following?			
<p>A. With respect to the organisation's core business, i) the users of core business ii) the key stakeholders.</p>			
<p>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></p>			

¹ TasCOSS has the kind permission to utilise and distribute this tool as part of the HACC Client Engagement Program 2010. The tool was designed by the National Resource Centre for Consumer Participation in Health
 Organisational Self-Assessment and Planning Tool for Consumer and Community Participation
 Baur - 2010 3OrgSelf-AssessTool - 24-Nov-10

ORGANISATIONAL SELF ASSESSMENT & PLANNING TOOL FOR CONSUMER & COMMUNITY PARTICIPATION

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<p>CONSUMER AND COMMUNITY PARTICIPATION</p> <p>ORGANISATION – DEFINITION AND AIMS</p>

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

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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>	

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

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<p>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></p>			Current	Proposed	
<p>D. An organisational business/strategic plan that recognises and supports consumer and community participation.</p>					

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AREA 1 – GOVERNANCE, STRATEGIC PLANNING, POLICIES					
CONSUMER AND COMMUNITY PARTICIPATION	Current Activities	Goals/proposed outcomes	Level of Participation		Action(s) needed
<p>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></p>	<p>What is the organisation currently doing to support consumer and community participation in its governance, strategic planning, policies?</p>	<p>What does the organisation plan to achieve in relation to consumer and community participation? <i>(Re: governance, strategic planning, policies)</i></p>	<p>6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None</p>	<p>What steps will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: governance, strategic planning, policies)</i></p>	<p>By when/who</p>
<p>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></p>			Current	Proposed	
<p>F. Organisational policies that are developed with contributions from consumers and community.</p>					

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AREA 1 – GOVERNANCE, STRATEGIC PLANNING, POLICIES					
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CONSUMER AND COMMUNITY PARTICIPATION	Current Activities	Goals/proposed outcomes	Level of Participation		Action(s) needed	By when/ who
			current	Proposed		
<p>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></p>	<p>What is the organisation <u>currently</u> doing to support consumer and community participation in its governance, strategic planning, policies?</p>	<p>What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? <i>(Re: governance, strategic planning, policies)</i></p>	<p>6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None</p>		<p>What steps will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: governance, strategic planning, policies)</i></p>	
<p>G. Other (define).</p>			current	Proposed		

ORGANISATIONAL SELF ASSESSMENT & PLANNING TOOL FOR CONSUMER & COMMUNITY PARTICIPATION

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

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AREA 2 - OPERATIONS					
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<p>When considering operations, the range of activities related to consumer and community participation can include the following: <i>(Identify N/A as necessary)</i></p>	<p>What is the organisation <u>currently</u> doing to support consumer and community participation in its operations?</p>	<p>What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? <i>(Re: Operations)</i></p>	<p>6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None</p>		<p>What steps will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: operations)</i></p> <p>By when/who</p>
<p>C. Feedback mechanisms that facilitate information flow between the organisation and consumers and community members.</p>			Current	Proposed	
<p>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></p>					

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

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<p>When considering operations, the range of activities related to consumer and community participation can include the following: <i>(Identify N/A as necessary)</i></p>	<p>What is the organisation <u>currently</u> doing to support consumer and community participation in its operations?</p>	<p>What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? <i>(Re: Operations)</i></p>	<p>6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None</p>		<p>What steps will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: operations)</i></p> <p align="right">By when/who</p>
<p>G. Key staff and consumers who are identified to promote and support consumer and community participation within the organisation.</p>			Current	Proposed	
<p>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></p>					

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

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AREA 3 – EDUCATION/TRAINING, EVALUATION					
CONSUMER AND COMMUNITY PARTICIPATION	Current Activities	Goals/proposed outcomes	Level of Participation		Action(s) needed
<p>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></p>	<p>What is the organisation <u>currently</u> doing to support consumer and community participation in its education and training?</p>	<p>What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? <i>(Re: education and training)</i></p>	<p>6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None</p>		<p>What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: education and training)</i></p> <p>By when/who</p>
<p>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></p>			Current	Proposed	
<p>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></p>					

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<p>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></p>	<p>What is the organisation <u>currently</u> doing to support consumer and community participation in its education and training?</p>	<p>What does the organisation <u>plan</u> to achieve in relation to consumer and community participation? <i>(Re: education and training)</i></p>	<p>6 Control 5 Delegate 4 Plan Jointly 3 Advise 2 Consult 1 Receive info 0 None</p>		<p>What <u>steps</u> will the organisation take to achieve the goals/proposed outcomes related to consumer and community participation? <i>(Re: education and training)</i></p> <p>By when/who</p>
<p>C. Strategies that prepare the organisation to address issues related to involving special groups. <i>(Consider marginalised consumer groups, culturally and linguistically diverse groups)</i></p>			Current	Proposed	
<p>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></p>					

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<p>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></p>					
<p>F. A plan for the use of evaluation results for organisational change.</p>					

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<p>G. Other (define).</p>			Current	Proposed	