Meaningful Engagement Organisational Foundations Self-Assessment

By Chris Ash, Aubrey Lloyd, and Sophie Otiende for The Meaningful Engagement Toolbox by Collective Threads Initiative

What Do We Mean by "Foundations"?

> **Foundations refers to the structures an organisation has in place to support shifts in its meaningful engagement initiatives.**
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> When building a new house or conducting renovations on an existing one, you want to make sure your foundations are secure. This sets the construction or renovation up for a greater chance of stability and success. Similarly, when you are beginning a meaningful engagement initiative or preparing to expand your existing one, you want to make sure your organisation has the support in place that will provide greater "scaffolding" to any projects.
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> Our work on foundations aligns with Collective Threads Initiative's organisational readiness framework, explained in detail later.

Why consider a foundations assessment before beginning meaningful engagement work?

First off, kudos to you and your organisation for wanting to emphasise and incorporate meaningful engagement of people with lived experience. That shows an interest in modelling promising practices to improve your anti-oppression work!

This work is sometimes hard and can come with unexpected challenges. Organisations that dive into new work (or into making significant changes to existing work) to meaningfully engage people with lived experience without first assessing their foundations may risk alienating impacted people and communities, or causing harm that can be challenging to repair. Investing time in foundations and/or readiness work before diving in can help you anticipate, identify, and prepare for some of those challenges in advance. Some people might refer to this as "building capacity," which simply means addressing gaps by strengthening the systems, policies, people, and protocols that you have in place to support the kind of work you want to do. Addressing organisational gaps for meaningful engagement is not just an add-on for when you have free time or funding for it. Meaningful engagement profoundly transforms an organisation, amplifying its capacity and capability through an enriched understanding of diverse perspectives. This engagement fuels innovation, cultivates inclusivity, and fortifies resilience. By embracing and integrating these genuine insights, organisations are better equipped to navigate complexities, capitalise on opportunities, and achieve sustainable, long-term growth.

You can address the gaps that impact your organisation's ability to successfully adopt meaningful engagement by:
- Learning from any current or past efforts and making changes accordingly.
- Ensuring that you have the knowledge and resources in place to engage effectively.
- Having support from organisational leadership and buy-in from staff.[1]
- Having a trauma-informed and compassionate organisational culture and willingness to change.

Just like your organisation may need to address structural gaps, the people who work for or with your organisation may need to build individual skills and abilities by addressing many of the same criteria listed above. An organisational readiness assessment can help you identify which of those areas are most in need of strategic improvement.

When we think of the goals of improving an organisation's capacity for certain kinds of work, a simple framework is that we want to improve our knowledge, attitudes, and skills. Some efforts to address gaps focus on improving organisations' knowledge and skills, but addressing attitudes is always important to achieving true readiness. Attitudes may hold biases about impacted people that we weren't even consciously aware of, and yet those biases show up in all levels of our work. If you find that your readiness scores are significantly lower than you expected, or that your meaningful engagement efforts have been hindered despite apparent structural readiness, consider reflecting on your "why" for meaningful engagement, which may reveal underlying or unconscious biases or power dynamics.

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[1] "Buy-in" means that people believe in an idea, process, or approach. If you have leadership buy-in, that means they are willing to make changes to ensure a work can be done with integrity. If you have staff buy-in, that means they understand why something is important and will want to support the strategy.

Remember that all major transitions, like starting a new career or deciding to leave an unhealthy situation, require a degree of readiness and also a degree of willingness to step into the unknown. If you wait until you're entirely ready, you might never do it. Rather than being seen as barriers, this foundations assessment and our associated readiness assessments can be viewed as tools that provide insight into potential challenges and areas for improvement. They can help individuals and organisations:

- Identify strengths and weaknesses.
- Develop targeted strategies for growth.
- Anticipate potential obstacles.
- Plan for effective resource allocation.

One final note: This self-assessment tool is a high-level overview to identify common areas that might need improvement. There are also intense and rigorous readiness assessments that require external evaluation to score and assess. If you want a more thorough readiness assessment, reach out to CTI for a referral to a partner evaluator.
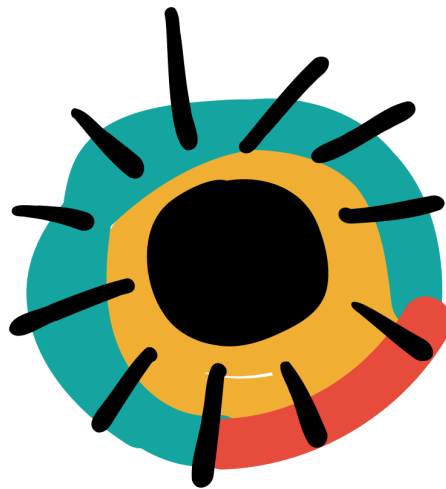
Completing the Foundations Self-Assessment

Following are basic instructions for conducting an organisational readiness self-assessment. Please note that there are ways to expand this process, incorporate different analysis tools, and gather additional information. Consult with an experienced evaluator for advanced or complex assessment.

Steps to completing the foundations assessment:

Step	Responsible Person	Time-frame	Results/ Notes
1) Determine who will manage the assessment. This could be a staff person or an external evaluator.			
2) Determine who will complete the surveys and how. This may be a selection of key staff or partners who take the survey with an assessment manager who compiles and scores the responses, or it could be an assessment manager who gathers information through a combination of reviewing protocols, budgets, and administrative documents alongside surveys and key informant interviews.[2]			

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[2] "Key informant interviews" are a method of gathering information through interviews with individuals who have access to needed insights and information. For example, to better understand answers for Questions 3 and 4, an organization may engage a consultant to conduct key informant interviews with three staff members in each department to assess their awareness of the organisation's meaningful engagement efforts. This would provide helpful information in itself, but may also prove interesting in comparison to organisational averages on the responses to those survey questions. For example, if nobody interviewed has extensive familiarity with the organisation's meaningful engagement initiatives, but survey responses suggest a high percentage of employees are perceived to be well-informed, this presents an opportunity for curious exploration and potential remedies.

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3) Based on the assessment manager and the populations to be surveyed or interviewed, outline a clear confidentiality policy and/or set up systems to protect staff or partners from retaliation (such as an external partner receiving the survey responses and delivering only de-identified numeric responses to the assessment manager).			
4) Modify or remove any questions that are not applicable to the organisation being assessed.			
5) Determine whether to deliver the survey on paper or online and set up any necessary documents or online forms.			
6) Gather responses as outlined in your assessment plan above.			
7) Calculate average scores for each question on the survey and enter those into the Average Scores Chart.[3]			
8) Use the average scores for each question to calculate the average scores for each indicator and enter those into the Average Scores Chart. List any indicators that had an average score of 1, 2, or 3. These are your target indicators.			

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[3] To calculate the average score for a question, add up all the scores for that question across multiple survey respondents and divide it by the number of respondents calculated. So for example, if your scores were 3, 2, 2, 4, and 1, you would **first add those numbers** for a total of 12, and **then divide that sum by the number of scores included** (which is 5) – 12 divided by 5 = 2.4. So you would enter an average score of 2.4 in the "Avg Score by Question" column on the Average Scores Chart.

9) Gather key partners in the organisation and/or community to conduct a brainstorming session on possible activities for increasing readiness on the target indicators. Decide on 5-10 activities that seem feasible and impactful. List those activities in the Priority Score Worksheet and assign scores for impact/importance and resources/effort through collaborative discussion.			
10) Plot each activity into the Priority Matrix. This will help inform a workplan to help your organisation and partners build readiness for intentional, structured meaningful engagement initiatives.			
11) Develop a workplan based on the findings of the Priority Matrix. A Basic Workplan template is provided in the Tools for Analysis section below.			
12) Consider beginning preliminary planning for intentional meaningful engagement initiatives alongside foundational work, but be transparent with partners about limitations and current efforts at building foundations. Consider listing and weighing potential benefits and potential harms of taking different actions when considering whether to wait or move forward at any time.			

Remember: CTI may be able to provide or refer out to guidance on implementation. Reach out to _meaningfulengagement@collectivethreads.org_ for more information.

Our Foundations Framework

Our Foundations Framework consists of:
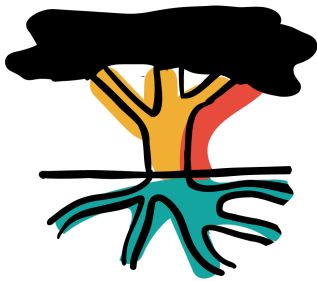
1) Different organisational spheres of readiness that can impact how your organisation's meaningful engagement efforts turn out.

2) Different stages of learning that can be measured for those spheres of readiness.

3) A survey that can help you gauge your organisation's stage of learning in each of these spheres.

4) Basic analysis tools that can help you understand next steps.

It is important to remember that your efforts at each level will be better supported if the foundations levels below it are achieved. Your goal will most often be to move to the next level, rather than to move immediately to the highest level.

Spheres of readiness

These are not the only spheres of readiness that are important for meaningful engagement practices to thrive. However, assessing your organisation across the areas can give an idea of the remaining foundations work that can increase the likelihood of intended outcomes in your meaningful engagement work. **Remember: Organisational readiness assessment does not tell you how well you are doing or how well you will be doing in a particular area. Rather, it helps you identify potential gaps that, if addressed, could increase the likelihood of successful initiatives.**

Existing Efforts		Existing Resources	
Level of efforts	Knowledge of efforts	Understanding of issue	Infrastructure and allocation
Why this is important: ● Understanding existing efforts can help identify where changes might be made, which supports a smoother transition. ● Some existing engagement practices may be excellent, and some may be potentially harmful or tokenising.	*Why this is important:* ● Staff who are aware of existing efforts may better understand the organisation's existing approach to meaningful engagement. ● Misinformation about meaningful engagement may need to be explicitly addressed through education before new efforts or major changes will be successful.	*Why this is important:* ● When your partners understand meaningful engagement, you are able to foster more holistic and consistent experiences for the impacted people you work with. ● When your funders understand meaningful engagement, they will support essential budget allocations.	*Why this is important:* ● Meaningful engagement practices may add new steps to programme processes or require consistent allocation of budget resources towards those practices.

People and Expertise		Climate and Culture	
Leadership support	Staff and partner buy-in	Organisational culture[4]	Willingness to change
Why this is important: ● Unsupportive or under-resourced leadership can hinder frontline efforts to improve meaningful engagement. ● Leadership may pay lip service to support while also resisting allocation of resources as needed.	*Why this is important:* ● Even with supportive leadership, if frontline staff do not support changes there will be resistance and resentment. ● Staff who do not have or have not disclosed lived experience may feel threatened.	*Why this is important:* ● Having trauma-informed practices in place (including for acknowledging historical and systemic trauma), along with clear protocols for raising and addressing grievances, ensures that the impacted people you engage are covered by protective and accountable systems. ● The ultimate goal of meaningful engagement is belonging. Having an organisational culture where people can be themselves at work makes belonging more likely.	*Why this is important:* ● Learning that past, well-intentioned efforts may have been tokenising or unintentionally biased, or even that good efforts can be improved, can lead to defensiveness. Often *unlearning* practices and beliefs is as important as learning.

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[4] For organisational culture, we have focused on trauma-informed employment practices and staff/contractor feedback loops. However, meaningful engagement does not *begin* with consultants, contractors, and staff, but rather with ensuring that organisational offerings and practices are developed based on the needs of the community rather than the organisation, and recognizing that meaningful engagement is improved by getting feedback from those participating in the programme rather than just contractors and/or staff with lived experience. Our full meaningful engagement assessments include engagement directly with impacted communities in greater detail.

Levels of readiness and stages of learning[5]

Assessing and understanding levels of organisational readiness can help you plan strategies that move you towards your goals.

For example, if you initiate a new meaningful engagement programme or substantial changes to your initial one when your organisation is still in "denial/resistance," your programme or changes are likely to fail. The question you would ask to determine next steps is: "What would facilitate the organisation shifting from denial/resistance to vague awareness?" Many programmes, initiatives, and efforts on a variety of issues fail due to moving too quickly without adequate consideration of readiness.

Also remember that progress is not always linear, onward, and upward. You may occasionally find that your organisation has slipped into a lower level than it had been and needs to work on rebuilding from there. It can be hard to let go of our pride and release who we were as an organisation, but it's from there that the new seeds can grow.

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[5] Adapted from Colorado State University's Tri Ethnic Center Community Readiness Assessment and Chicago Public Schools "Liberatory Thinking Tool". See: https://www.cps.edu/globalassets/cps-pages/sites/equity/tools/liberatory-thinking-interactive-200917.pdf.

Readiness level	Associated stage of learning	Description	May sound like	If you are at this level
1. No awareness *(Indicator score of 1)*	Getting ready to learn	Issue is not generally recognised by the organisation or leaders as a problem. Organisations at this stage of learning often lack client-centric services that support the whole person and their community, focus on individualistic solutions, or have significant power dynamics that impede meaningful engagement.	"All this talk about meaningful engagement distracts us from the real issue of ending violence!"	Activities could work on helping the organisation and its leadership understand how meaningful engagement of people with lived experience is important, is being practiced in other settings, and can help with sustainability and impact.
2. Denial/ resistance *(Indicator score of 2)*	Getting ready to learn	At least some members of leadership or staff recognise that it is a concern but they may be hesitant to acknowledge that *their own* organisation needs improvement.	"Yes, those other organisations definitely need to improve their engagement. We've had an advisory council since before *meaningful engagement* was a thing."	Activities could work on identifying barriers or reasons for resistance so that they can be openly addressed. A common barrier is fear that admitting that past efforts were tokenising or insufficient will make the organisation look bad. Activities that normalise accountability and learning from mistakes can help.

3. Vague awareness *(Indicator score of 3)*	Ready to learn	Most feel that there is a concern within the organisation, but there is no immediate motivation to do anything about it as leadership may not understand the role of meaningful engagement in sustainability preparedness and addressing organisational gaps.	"I'd love to do more meaningful engagement if we had the time and money."	Activities could focus on identifying ways that meaningful engagement improves sustainability, appropriateness, and impact of services to foster understanding of why it is a priority.
4. Preplanning *(Indicator score of 4)*	Ready to learn	There is clear recognition that something must be done, and there may even be a group addressing it. However, efforts are not focused or detailed.	"Clearly, we need to start writing meaningful engagement into each grant proposal, project, and budget. Let's discuss how to go about this at the next leadership meeting."	Activities could include identifying ways to carve out funding for meaningful engagement in existing budgets as well as educating relevant staff on how to write meaningful engagement into all grant applications across all programmes.
5. Preparation *(Scoring 5 on an indicator means you are at this level or higher)*	Learning	Active leaders begin planning in earnest. The organisation offers modest support of efforts.	"Let's have a group with multiple staff members and consultants with lived experience start working through The Meaningful Engagement Handbook to see if it makes sense to do a survey."	Activities could include reviewing the organisational strategic plan for areas where meaningful engagement could be integrated into existing plans and whether revision is needed, as well as beginning learning groups among staff on meaningful engagement practices.

6. Initiation[6]	Learning	Enough information is available to justify efforts. Activities are underway.	"We drafted a workplan to improve three indicators at our target level over the next six months. We're nervous and hope it goes well!"	Activities planned in earlier stages are begun.
7. Stabilisation	Delivering	Activities are supported by the leadership, board, and funders. Staff are trained and experienced.	"We included updates highlighting positive changes we've made in our programming as a result of our meaningful engagement initiatives in every board and funder report for the last two years, and they're starting to ask us for updates in our meetings! They're coming around, and our leadership is excited."	Activities are regularly being evaluated to learn and improve, and findings shared publicly in messaging for donors, the public, and impacted communities.
8. Confirmation/ expansion	Delivering	Efforts are in place. Community members feel comfortable using our services, and staff support meaningful engagement initiatives. Data on meaningful engagement and its outcomes are regularly obtained.	"We're continuing steady efforts on our meaningful engagement workplans, and evaluate the prior year's data so that every year we can identify any needed changes."	Past years' evaluations have identified potential new approaches and activities, and these are integrated into programming as feasible.

[6] The foundations assessment only covers readiness levels through Preparation. This is because if you are at this level you have a solid foundation for beginning or diving deeper into intentional meaningful engagement initiatives.

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| 9. High level of community ownership | Delivering | Detailed and sophisticated knowledge exists about the organisation's approach to meaningful engagement, and all programme staff, managers, and directors feel confident applying our approach to new programming. Effective evaluation guides new directions. | "It's kind of weird to me that we used to do this work without engaging impacted people at every stage and level of the work. It just feels like second nature now." | At this level activities are second nature and well-integrated into organisational culture, carrying on even if and when there is staff turnover. |

The Meaningful Engagement Foundations Self-Assessment Survey

Organisations may choose to convert this into an online survey for ease of response and analysis.

Note: For questions where none of the answers is a perfect fit, choose the one that comes closest to reflecting your organisation's situation. Strive to answer questions as honestly as possible. The goal isn't to score well, but rather to have a realistic assessment of where your organisation is on its meaningful engagement journey.

1. Does your organisation currently engage people with lived experience in providing guidance to organisational policy and programming?

Answer	Not at all	When it's not much work	Sometimes	Often	Usually or always
Circle one	1	2	3	4	5

2. How often are people with lived experience compensated for their time and expertise providing guidance to your organisation?

Answer	Not at all	Only when sharing their story	Sometimes	Often	Usually or always
Circle one	1	2	3	4	5

3. Approximately how many of the organisation's staff and contractors are knowledgeable about existing meaningful engagement efforts?

Answer	A few	Only the "Survivor Leadership" staff	About half	More than half	Most or all
Circle one	1	2	3	4	5

4. Approximately how many of the organisation's staff and subject matter experts likely have misinformation about existing meaningful engagement efforts?

Answer	None	A few	About half	More than half	Most or all
Circle one	5	4	3	2	1

5. How well do your collaborative and community partners understand the importance of meaningful engagement?

Answer	None	A few	About half	More than half	Most or all
Circle one	1	2	3	4	5

6. How well do your funders understand the importance of meaningful engagement?

Answer	Not at all	A little, but they are resistant to funding meaningful engagement	Some understand it reasonably well, and others are still struggling	Most of our funders understand it well and the importance of funding it	Most of our funders actively advocate for or require it
Circle one	1	2	3	4	5

7. Have you budgeted for the improvement of meaningful engagement efforts for the overall organisation?

Answer	Not at all – it hasn't been a priority	Not at all – we are unable to because of funding or leadership restrictions	In some programmes at a small level	Over half of our department budgets include funding for meaningful engagement	Budgeting for meaningful engagement is part of every grant proposal
Circle one	1	2	3	4	5

8. Does or will every project include specific and intentional plans for meaningful engagement?

Answer	Not at all – it hasn't been a priority	Not at all – we are unable to due to funding or leadership restrictions	In some programmes at a small level	Over half of our department budgets include funding for meaningful engagement	Budgeting for meaningful engagement is part of every grant proposal
Circle One	1	2	3	4	5

9. How willing is your organisation's board to make changes, including in budgets and narratives, to improve meaningful engagement at all levels and in all programmes?

Answer	They have not seriously considered or discussed this	They have discussed it and are resistant	Slightly willing and likely	Somewhat willing and likely	Very willing and likely
Circle one	1	2	3	4	5

10. How willing is your organisation's executive leadership to make changes, including in budgets and narratives, to improve meaningful engagement at all levels and in all programmes?

Answer	They have not seriously considered or discussed this	They have discussed it and are resistant	Slightly willing and likely	Somewhat willing and likely	Very willing and likely
Circle one	1	2	3	4	5

11. Have there been appropriate efforts to engage staff and contractors at all levels about the importance of intentional, measured improvement of meaningful engagement practices?

Answer	This has not been on our radar	I am unsure that it would help	There have been only minimal efforts	There have been some efforts, or they've only happened recently	This has been prioritised and we have made good progress
Circle one	1	2	3	4	5

12. Have there been appropriate efforts to ensure staff and contractors understand the potential benefits of improved meaningful engagement in our direct work?

Answer	This has not been on our radar	I am unsure that it would help	There have been only minimal efforts	There have been some efforts, or they've happened only recently	This has been prioritised and we have made good progress
Circle one	1	2	3	4	5

13. Does your organisation take practical steps to be a trauma-informed workplace?

Answer	This has not been on our radar or we have not been able to prioritise it	Leadership worries that it would impede staff's ability to meet deliverables	There have been only minimal efforts	There have been some efforts, or they've only happened recently	This has been prioritised and we have made good progress
Circle one	1	2	3	4	5

14. Does your organisation take practical steps to ensure that all staff, contractors, and participants, including those from impacted communities, feel like they can be themselves in the organisation?

Answer	This has not been on our radar or we have not been able to prioritise it	Leadership worries that it would impede staff's ability to meet deliverables	There have been minimal efforts, or they've only happened recently	There have been some efforts across programmes	This has been prioritised and we have made good progress
Circle one	1	2	3	4	5

15. How much resistance would you anticipate from leadership and staff if you asked them right now to change or improve existing practices?

Answer	None	A little	Some	A lot	They likely will not allow the change we need
Circle one	5	4	3	2	1

16. Does your organisation have regular and ongoing feedback loops for staff and contractors to share their experiences, as well as a plan for and commitment to continual quality improvement based on that feedback?

Answer	Not at all – it hasn't been a priority	Not at all – we are unable to because of funding or leadership restrictions	In some programmes at a small level	Our organisation regularly surveys staff and adjusts based on findings	Our organisation regularly surveys staff and tracks trends in staff grievances, and adjusts based on findings
Circle one	1	2	3	4	5

Tools for Analysing the Assessment Results

After data is collected according to your assessment plan, you will want to analyse that data and determine a plan for next steps.

Steps to analysing the foundations self-assessment:[7]

1) After reviewing the assessment results, use the average scores for each question to calculate the average scores for each indicator, and enter those into the *Average Scores Chart*. List any indicators that had an average score of 1, 2, or 3. These are your target indicators.
2) Gather key partners in the organisation and/or community to conduct a brainstorming session on possible activities for increasing readiness on the target indicators.
3) Decide on 5-10 activities that seem feasible and impactful. List those activities in the *Priority Score Worksheet* and assign scores for impact/importance and resources/effort through collaborative discussion.
4) Plot each activity into the *Priority Matrix*. This will help inform a workplan to help your organisation and partners build readiness for intentional, structured meaningful engagement initiatives.
5) Develop a workplan based on the findings of the Priority Matrix. A *Basic Workplan* template is provided below.
6) Consider beginning preliminary planning for intentional meaningful engagement initiatives alongside foundational work but be transparent with partners about limitations and current efforts at building foundations. Consider listing and weighing potential benefits and potential harms of taking different actions when considering whether to wait or move forward at any time.

All tools referenced above follow in this section. Where feasible, we have included a sample entry to model how to use the tool.

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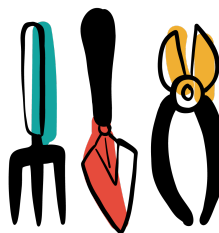
[7] See the table in the introduction for a sample assessment workplan.

Average scores chart

For our survey scoring, please note that we are primarily focused on the first four levels of readiness, as the Meaningful Engagement Toolbox is primarily focused on supporting organisations at levels five through nine. Thus, levels one through four can be seen as "recommended pre-requisites" for beginning a structured meaningful engagement improvement initiative. An organisation entering level five is well-positioned to begin meaningful engagement efforts in earnest.

Indicator	Questions	Avg Score by Question[8]	Avg Score by Indicator[9]	Notes
	Existing Efforts			
Level of existing efforts	1. Does your organisation currently engage people with lived experience in providing guidance to organisational policy and programming?			
	2. How often are people with lived experience compensated for their time and expertise providing guidance to your organisation?			
Knowledge of existing efforts	3. Approximately how many of the organisation's staff and contractors are knowledgeable about existing meaningful engagement efforts?			
	4. Approximately how many of the organisation's staff and contractors likely have misinformation about existing meaningful engagement efforts?			

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[8] To calculate the average score for a question, add up all the scores for that question across multiple survey respondents and divide it by the number of respondents calculated. So for example, if your scores were 3, 2, 2, 4, and 1, you would **first add those numbers** for a total of 12, and **then divide that sum by the number of scores included** (which is 5) – 12 divided by 5 = 2.4. So you would enter an average score of 2.4 in the "Avg Score by Question" column on the Average Scores Chart.

[9] To calculate the average score for an indicator, add up the average scores for each question under that indicator and divide it by the number of questions calculated. So, for example, if an indicator's questions had average scores of 2.4 and 3.7, you would **first add those numbers** for a total of 6.1 and **then divide that sum by the number of average scores included** (which is 2) – 6.1 divided by 2 is 3.05, so you would enter that in the "Avg Score by Indicator" column for that indicator.

Existing Resources				
Understanding of meaningful engagement	5. How well do your collaborative and community partners understand the importance of meaningful engagement?			
	6. How well do your funders understand the importance of meaningful engagement?			
Infrastructure and allocation for meaningful engagement	7. Have you budgeted for the improvement of meaningful engagement efforts for the overall organisation?			
	8. Does or will every project include specific and intentional plans for meaningful engagement?			
People and Expertise				
Leadership support for meaningful engagement	9. How willing is your organisation's board to make changes, including in budgets and narratives, to improve meaningful engagement at all levels and in all programmes?			
	10. How willing is your organisation's executive leadership to make changes, including in budgets and narratives, to improve meaningful engagement at all levels and in all programmes?			

Staff and partner buy-in for meaningful engagement	11. Have there been appropriate efforts to engage staff and contractors at all levels about the importance of intentional, measured improvement of meaningful engagement practices?			
	12. Have there been appropriate efforts to ensure staff and contractors understand the potential benefits of improved meaningful engagement in your direct work?			
Climate/Culture				
Lived-experience-friendly organisational culture	13. Does your organisation take practical steps to be a trauma-informed workplace?			
	14. Does your organisation take practical steps to ensure that all staff, contractors, and participants, including those from impacted communities, feel like they can be themselves in the organisation?			
Willingness to change	15. How much resistance would you anticipate from leadership and staff if asked to change or improve existing practices?			
	16. Does your organisation have regular and ongoing feedback loops for staff and contractors to share their experiences, and a plan for and commitment to continual quality improvement based on that feedback?			

Activity brainstorming

Please list below any indicators on which the average score is a 1, 2, or 3. These are your "Target Indicators." Gather key partners in the organisation and/or community to conduct a brainstorming session on possible activities for increasing readiness on the target indicators. Decide on 5-10 activities that seem feasible and impactful.

Target Indicator   **Potential Activities**

1.

2.

3.

4.

5.

To continue work on your target indicators, place the 5-10 feasible and impactful activities you listed above in the Priority Score Worksheet below. If you are unsure if you could move forward with your structured meaningful engagement improvement efforts despite a score below 4, consider making a list of and discussing potential benefits and potential harms of moving forward without intentional readiness activities first

Priority score worksheet

1. After completing the average score chart, facilitate a brainstorming session among key partners within and/or outside of your organisation to determine potential activities to improve that indicator's foundations score. For each indicator, determine 5-10 activities that seem feasible and impactful. List each of these "priority activities" on a row in the below chart.
2. Assess the potential impact and potential resources required.
3. This activity is best completed in a facilitated team discussion and may require multiple sessions with the investigation of data and resources in between to complete accurately and effectively.

Priority Activity and Foundations Question:	Assessment of potential impact/ importance on a scale of 1-5	Assessment of funds or staffing resources required on a scale of 1-5	Is there (or will there be) a plan for ensuring this work is sustainable beyond our assessment period?	Notes
Have one programme give a brief update at one all-staff meeting per quarter about how they're currently engaging lived experience (knowledge of existing efforts).	*4*	*1*	*Yes, this could become a regular quarterly practice.*	*May want to start by choosing the programmes that have a stronger history and track record of lived experience engagement.*

Priority Activity and Foundations Question:	Assessment of potential impact/ importance on a scale of 1-5	Assessment of funds or staffing resources required on a scale of 1-5	Is there (or will there be) a plan for ensuring this work is sustainable beyond our assessment period?	Notes

Priority matrix

Assess your priority items for potential impact and the amount of resources from the Priority Score Worksheet and identify which activities could come first.

	Low Resource/ Effort	High Resource/ Effort
High Impact/ Importance	**Prioritise** *Prioritise for implementation if you can develop a reasonably secure sustainability plan with your local partners.*	**Investigate** *Investigate options, potential sustainable funding streams, and potential contracts.*
Low Impact/ Importance	**Consider** *Consider as a future project based on capacity.*	**Deprioritise** *Also deprioritise any projects that are not sustainable beyond the initial grant period.*

Basic workplan

Some organisations may already have workplan templates or project management software that they use. For those that do not, this simple template can be used or adapted to turn the priority matrix into a workplan. Activities from the Priority Matrix go into the "Activity" column.

Activity	Steps[10]	Responsible Person	Teams/Collaborators	Timeline
Have one programme give a brief update at one all-staff meeting per quarter about how they're currently engaging lived experience (knowledge of existing efforts).	*1) Identify four programmes with strong meaningful engagement practices.* *2) Work with Team Leads to identify the right people to share.* *3) Develop schedule for 2026 quarterly presentations.* *4) Develop guidelines (time limits, etc.) for presenters.* *5) Develop and assign a schedule for reminder emails to presenters as well as the staff person responsible for agenda development one week and three weeks before each presentation.*	*1) Leadership team* *2) Leadership team* *3) Operations Coordinator* *4) Operations Director* *5) Operations Coordinator*	*Programme directors who supervise presenters* *Some presentations may include advisory board members or consultants*	*1) 3 August 2025* *2) 3 Sept 2025* *3) 3 Sept 2025* *4) 3 Oct 2025* *5) 3 Nov 2025*

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[10] Remember to include planning for and procurement of any budget or resource allocation in steps required.

Activity	Steps	Responsible Person	Teams/Collaborators	Timeline

Activity	Steps	Responsible Person	Teams/Collaborators	Timeline

Notes on follow-through and accountability:

Questions or ideas? Reach out to us at meaningfulengagement@collectivethreads.org or review the other documents in our Meaningful Engagement Toolbox at collectivethreads.org/meaningfulengagement.