WORKSHEET (Fill out accordingly)

Who are the members of the decision team?	Names:	Positions:
Who is the team leader?	Name:	Position:
To whom will the team present its findings?	Name:	Position:
What is the outcome the team is mandated to achieve?	☐ Decision ☐ Recommendation ☐ Issue Analysis (with no recommendation or decision) ☐ Other:	
If there is disagreement in the group, how is this disagreement to be handled?	☐ Strong Consensus (the group will deliberate until everyone is in general agreement about the actual decision). ☐ Procedural Consensus (the group will deliberate until the point at which, while there is not agreement on the actual decision, everyone is in general agreement that the various different perspectives have been heard, and reasons have been exchanged such that the process has been fair and the decision reached is reasonable). ☐ Majority Rule (the group will deliberate until a majority of participants (measured by vote) agrees on the actual decision). ☐ Stamina Rule (the group will deliberate until the most passionate and vocal member outlasts the rest of the group). ☐ Leader Rule (the leader of the group will make the final decision). ☐ Other:	
Do group members agree to the following:	• The group's attitude towards different and sometimes difficult to hear or unpopular perspectives on issues will be to actively seek these out, and try to understand and respond to them.	☐ Yes ☐ No
	• The group will engage affected stakeholders by sharing the decision team's recommendations and rationale, and by inviting and responding to feedback.	☐ Yes ☐ No
	• Group members will treat each other with kindness, seek to understand each other's perspectives, and engage together to debate reasons without making things personal.	☐ Yes ☐ No
	• The group will defend beliefs about facts with evidence.	☐ Yes ☐ No

WORKSHEET (Fill out accordingly)

Questions that need to be addressed:	The Key Question the team will focus on:
1.	
2.	
3.	
4.	
5.	
6.	

WORKSHEET (Fill out accordingly)

What we know for sure…	Our evidence for this is…
About the patient population	
About the care providers	
About relevant laws and policies	
About the broader community	
About the system	
What we don't know but can find out…	The person responsible for getting this information…
What we don't know and will have to guess about…	

WORKSHEET (Fill out accordingly)

However we answer the key question, "(insert key question)" it is important that...	Priority:				
	Important 1	Very 2	Important 3	4	Crucial 5
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
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	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐

Step **4b** **Synthesize Values (optional)**

WORKSHEET (Fill out accordingly)

Value	Value Description (However we answer the key question, "(insert key question)" it is important that…)	Average Score	**Rank**

WORKSHEET (Fill out accordingly)

The Key Question for which we are brainstorming:

Possible ways of answering the question:

WORKSHEET (Fill out accordingly)

The Key Question for this discussion is:

	List Most Important Values Here				
List Options Here					

WORKSHEET (Fill out accordingly)

For the question...	
Salient facts...	
We recommend that...	
This allows us to best...	
This solution does not...	
We argue that this is justified because...	

WORKSHEET (Fill out accordingly)

We commit to engaging (details on ensuing pages)	Broad Timeline	Person Responsible
☐ Patients/Clients/Residents		
☐ Families/Loved Ones		
☐ Staff		
☐ Physicians		
☐ Subgroups of the Public		
☐ Others:		

RECIPIENTS OF SERVICES CAN OFFER

- **Contextual** information about how they are affected by the system.
- **Outsiders'** views of system operations.
- **Personal** information about their own values — what matters to them and what causes them distress.

Why engage patients/residents/clients?

- The purpose of the system is to serve patient needs. Patients are the experts about their goals of care and systems should be designed to best meet these goals.

- Patients understand best the impact of system decisions for the users of the system.

- Patients are representatives of the community and can provide insight into community values.

WORKSHEET (Fill out accordingly)

Specific Audience	Education Vehicle	How a safe discussion forum will be created	How feedback will be obtained	How feedback will be responded to	Lead	Timeline

FAMILY MEMBERS & LOVED ONES OFFER

- **Contextual** information about how their loved ones are affected by the system.

- **Contextual** information about how they are affected by the system.

- **Outsiders'** views of system operations.

Why engage families & loved ones?

- They are often directly impacted by system decisions so their wellbeing and personal integrity is at stake.

- They understand well the impact of system decisions for the users of the system.

- They can be close to patients and are often able to give voice to patient perspectives.

- They are representatives of the community and can provide insight into community values.

WORKSHEET (Fill out accordingly)

Specific Audience	Education Vehicle	How a safe discussion forum will be created	How feedback will be obtained	How feedback will be responded to	Lead	Timeline

STAFF CAN PROVIDE

- **Technical** information about the issue.

- **Contextual** information about relational dynamics and system function.

- **Personal** information about their own values — what matters to them and what causes them angst.

Why engage staff?

- They likely have key information that is needed for a good decision.

- They often have to discharge the decision, so their professional and personal integrity is directly on the line.

- They are at the point of care and need to be able to explain decisions to end users.

- Patients trust care providers, so care providers have a central role in the successful implementation of the decision.

WORKSHEET (Fill out accordingly)

Specific Audience	Education Vehicle	How a safe discussion forum will be created	How feedback will be obtained	How feedback will be responded to	Lead	Timeline

PHYSICIANS CAN PROVIDE

- **Technical** information about the issue.
- **Contextual** information about relational dynamics and system function.
- **Personal** information about their own values — what matters to them and what causes them angst.

Why engage physicians?

- They have expertise that is needed for a good decision.
- They have to discharge the decision, so their professional and personal integrity is also directly on the line.
- They need to be able to explain decisions to patients and loved ones.
- Patients trust physicians, so physicians are key to successful implementation of the decision.

WORKSHEET (Fill out accordingly)

Specific Audience	Education Vehicle	How a safe discussion forum will be created	How feedback will be obtained	How feedback will be responded to	Lead	Timeline

SUBGROUPS OF THE BROADER PUBLIC OFFER

- **Contextual** understanding of the values of the different communities served by the system.

Why engage subgroups of the broader public?

- Healthcare is a public initiative serving a society committed to democratic ideals.

- Democratic ideals require that those impacted by decisions know about these decisions and are able to influence them.

- Healthcare is delivered at arm's length from government. A government is elected, its leader appoints other leaders who work with bureaucracies to appoint boards, who hire CEOs, who hire other leaders, who guide policy.

- Those affected by policies most often don't know about these policies.

- The main way of influence is through provincial elections every four years — not very democratic.

- Public engagement at the regional level helps address the deficit.

WORKSHEET (Fill out accordingly)

Specific Audience	Education Vehicle	How a safe discussion forum will be created	How feedback will be obtained	How feedback will be responded to	Lead	Timeline

WORKSHEET (Fill out accordingly)

For the question...	
We went through these steps to come up with the recommendation (or decision)...	
We recommend (or decide) that...	
This recommendation best allows us to...	
We relied on these sources of evidence	
Key decisions we made in analyzing unclear or controversial evidence were	
We feel this was justified because	
Key decisions we made in balancing certain values were	
We feel this was justified because	

WORKSHEET (Fill out accordingly)

	Specific Audience	Key messages	Communication vehicle	Contact point for those wishing to follow up	Person responsible	Timeline
Before						
During						
After						

WORKSHEET (Fill out accordingly)

Specific Audience	Objectives	Education Vehicle(s)	Sustainability Plan	Lead	Timeline

WORKSHEET (Fill out accordingly)

Who will be affected by the decision?	Is the group's integrity likely to be compromised by the decision?	Have the group's perspectives been taken into account in the decision process?	What would assist those affected?	What support can be provided in this direction?	Who will lead the downstream support initiative for this group?

WORKSHEET (Fill out accordingly)

Broad Change Being Implemented	
Overall Change Sponsor/ Leader	

Evaluation component	Leader	Evaluation data to be gathered by date	Evaluation data to be reviewed and analyzed by date	Changes to approach to be made by date	Resources Required

WORKSHEET (Fill out accordingly)

Who can provide feedback on the decision?	
How will they know that this is a possibility and where can they obtain a feedback form?	
Who will be responsible for collecting this feedback?	
Who will be responsible for responding to this feedback?	
When/how often will the group meet to revisit the decision based on feedback obtained?	
Who will be responsible for revising the implementation plans as appropriate?	

WORKSHEET (Fill out accordingly)

Your Feedback is Important!

If you have any critical feedback or suggestions for improvement we ask that you complete the following table and submit it to _____
This can be done by _____

Your feedback will be acknowledged within _____
and _____ will provide you with a response to your reflections within _____ day(s).

THANK YOU FOR TAKING THE TIME TO HELP US DEVELOP THE MOST JUSTIFIED RESPONSE TO THIS QUESTION!

What do you like about this policy and/or the process used to generate it?	
What is your concern with the policy?	
If you think we are missing an important fact, or haven't got something right, tell us what we need to know.	
If the disagreement concerns the values, what is important that is not appropriately accounted for in the decision?	
If you believe an alternate solution would better live up to these facts and values, please share it.	
If the disagreement concerns process, what process elements should have happened differently? (e.g. Is there an individual or group that should have been consulted but was excluded?)	

WORKSHEET (Fill out accordingly)

Broad Change Being Implemented	
Overall Change Sponsor/ Leader	

Specific Deliverable/ Element	Leader	Responsible for	Accountable to	Change Partners	Timelines	Resources Required