

This worksheet describes elements required to recruit and include a family member/representative in programs, projects, committees, etc. It is recommended that at least two people on the project collaborate to answer the questions below.

Name(s) of person filling out this form: _____

Date: _____

| Part 1: Goals | |
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| The purpose of this project: <i>Using plain language, write three to four sentences that describe your project.</i> | |
| Why does your workgroup/team want to include the voices and experiences of family members? <i>Write 2 – 4 bullet points that describe what you hope to gain by having a family member with lived experience be a part of your team.</i> | |
| Specifically, what would you like the family representative to do? <i>As specifically as possible, include tasks you wish the family member to undertake. For example, “attend monthly meetings and contribute to team goals,” “suggest improvements to agency forms”.</i> | |
| What specific lived experience, skills, or characteristics would be helpful? <i>For example: “We seek a parent of a child who has been hospitalized in the last five years”, “We hope to engage a grandparent from a frontier county”</i> | |
| Part 2: Logistics | |
| Will the family representative work in a group or team setting? If so, please describe its approximate size and membership: <i>For example, Title V, Medicaid, or other state agency staff, physicians, nurses, social workers, hospital administrators, other families/consumers, etc.</i> | |
| Who is the primary contact for the family representative? <i>Will this person will be able to provide ongoing support if needed? Provide contact details</i> | |
| Who is the secondary contact? <i>Provide contact details</i> | |

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|--|-----------------------|---------------------------|----------------------|-----------------------|
| <p>What remuneration will be offered? <i>Consider the value of the person's lived experience/expertise as well as costs they may incur for travel, time from work, child care, etc. If no remuneration is offered, describe other benefits to the family representative.</i></p> | | | | |
| <p>How many family representatives do you seek? <i>Consider including more than one. Just as with professional team members, families may have absences.</i></p> | | | | |
| <p>If meetings are required, will there be an option to participate via phone, skype, or webinar?</p> | | | | |
| <p>Meeting times, days, locations, and frequency: <i>If meeting times are yet to be determined, will you invite the family to participate in choosing them?</i></p> | | | | |
| <p>Will there be tasks between meetings? <i>If yes, please list. For example, "Read project-related materials", "respond to committee emails" etc. Estimate the time commitment between meetings, if possible.</i></p> | | | | |
| Part 3: Project Needs | | | | |
| <p>How important are the following? <i>For items marked "very", how will your team accommodate family representatives who may have the experience you seek but may not be able to meet requirements? Consider the importance of including the voices of diverse families, including those who are traditionally unheard.</i></p> | Very Important | Somewhat Important | Not Important | We can support |
| <p>Ability to check and respond to email ___ times per week.</p> | | | | |
| <p>A personal laptop/ desktop & basic computer skills</p> | | | | |
| <p>Ability to use Skype /other online communication tools</p> | | | | |
| <p>Advanced writing skills</p> | | | | |
| <p>Willingness to speak up in small/medium group settings</p> | | | | |
| <p>Willingness to address large groups</p> | | | | |
| <p>Ability to arrange own transportation to meetings</p> | | | | |
| <p>Ability to meet during the work day</p> | | | | |
| <p>Are you able to use text messaging to communicate with the family representative? <i>(Text messaging is a preferred method of communication for many family members)</i></p> | | | | |
| <p>Are you able to communicate with the family representative after/before work hours, if necessary?</p> | | | | |

| Part 4: Next Steps | |
|--|--|
| What is the deadline for applying for this position? | |
| What is the process for applying for this position? <i>For example, should they call or email the project lead, fillout a formal application, etc? If no formal process, give enough details to help the family know what to do.</i> | |
| Will there be an interview for the position? <i>If so, when will interviews be held and who will conduct them? An interview process allows the family member to ask questions before accepting the position. Consider holding interviews for projects that will last for an extended period of time.</i> | |
| Other information about this position (if any): | |

Please return this form to: [OCCYSHN Family Involvement Program](#)

Suggested citation:

Bakewell T. (2019). Oregon Center for Children and Youth with Special Health Needs worksheet: Planning for meaningful family involvement. Family leader recruitment tool. Retrieved from: <https://www.ohsu.edu/occyshn/family-involvement-program>.