

Before You Invite:

An Engagement Planning Checklist



Use the questions below to reflect on your organization's current practices and identify areas that may require further planning before engagement begins.

Purpose & Intentions

- ☐ Have we clearly defined the purpose and goals of engagement?
- ☐ Have we identified how lived expertise will meaningfully contribute to our work?
- ☐ Are we prepared to consider and act on participants' contributions?

Accessibility & Equity

- ☐ Have we considered how we intend to address barriers such as transportation, childcare, technology access, and scheduling conflicts?
- ☐ Can we offer flexible participation options to accommodate different needs?
- ☐ Have we identified accommodations and resources needed for equitable participation?

Roles & Expectations

- ☐ Have we developed a clear role description outlining responsibilities and expectations?
- ☐ Have we identified which lived experiences, perspectives, or skills are relevant to the role without creating unnecessary barriers?
- ☐ Have we established the expected time commitment and participation requirements?

Power & Decision-Making

- ☐ Have we defined what decisions participants can influence?
- ☐ Have we clearly communicated any limitations to their decision-making authority?
- ☐ Have we established how participants' contributions will inform decisions?

Compensation & Responsibilities

- ☐ Have we established a fair compensation plan, including payment methods and rates?
- ☐ Have we clarified what activities count as paid work, including preparation and training?
- ☐ Have we reviewed relevant policies, protections, and resources, such as i2i's Sample Team Handbook?

Participation & Support

- ☐ Have we established expectations around consent, confidentiality, and personal boundaries?
- ☐ Have we considered how we plan to create a respectful, supportive environment?
- ☐ Have we identified who participants can contact for support, or to share concerns?

Accountability & Follow-Up

- ☐ Have we planned how participants will be informed about engagement outcomes?
- ☐ Have we established opportunities for participants to provide feedback and raise concerns?

Final reflection

- ☐ Are we prepared to adapt our organizational practices to support meaningful participation, rather than expecting participants to adapt to us?