Family Engagement in Systems Change

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Family Engagement in Systems (FES) Toolkit

Strategies and Resources

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Updated September 2026

Family Engagement in Systems (FES) Toolkit

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Introduction to the FES Toolkit

Family Voices is a family-led organization that transforms systems of care to work better for all children and youth, especially those with special health care needs and disabilities. By putting families at the forefront and centering their leadership and lived expertise, we build a culture that includes everyone and fosters equitable outcomes.

Family Voices created the Family Engagement in Systems (FES) Toolkit to inspire and support child- and family-serving organizations working to engage families and family-led organizations in systems-level initiatives. The FES Toolkit can be used as a standalone resource or as a companion document to the Family Engagement in Systems Assessment Tool (FESAT). The FESAT is a tool that organizations can use to assess and improve family engagement in systems-level initiatives, helping to ensure that the voices of the individuals, families, and communities who receive services are included in the creation of the policies and practices that govern those services.

The FES Toolkit and FESAT are based on a framework for family engagement developed by Family Voices. The framework includes the context of engagement, the continuum of engagement and four strategic domains of engagement.

We encourage organizations to use the strategies and resources in this toolkit to promote, strengthen, and improve family engagement.

If your team would like support or technical assistance as you use the FESAT or other family engagement materials from Family Voices, please reach out to our team by emailing FESAT@familyvoices.org.

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Where to Begin

Because organizations come to family engagement with different levels of experience, the FESAT resources are organized as a pathway. Use the pathway to choose the right starting point, prepare your team, complete the assessment, and turn results into action.

1

Learn why family engagement matters. Build shared understanding of meaningful family engagement, power-sharing, and the framework for meaningful engagement before you jump into assessing engagement.

2

Assess readiness. The Readiness Assessment can help you determine whether your team is just getting started, ready to complete the FESAT scoring process, or prepared to focus on sustainability and impact of your engagement work.

3

Follow your pathway. Level 1 tools help teams prepare for meaningful family engagement, Level 2 tools help teams assess engagement using the FESAT, and Level 3 tools help teams expand, sustain, and demonstrate the impact of their work.

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Learn Why Family Engagement Matters

Webinar: The Science of Family Engagement: Building More Responsive Systems

This webinar explores the science and principles behind authentic family engagement and highlights how partnerships among families, youth, service providers and other partners can transform programs and systems. Participants will learn approaches for integrating family engagement into organizational processes and strengthening systems that center family voice and leadership. **This webinar (available in English and Spanish) is foundational to helping your team or organization understand the principles of meaningful engagement.**

Research articles about the importance of Family Engagement

Family Engagement at the Systems Level: A Framework for Action
In this article, Family Voices presents a framework for meaningful family engagement, developed through a review of peer-reviewed publications and grey literature, key informant interviews, and collaboration with a Family/Professional Expert Workgroup.

Issue Brief: A Framework for Assessing Family Engagement
Learn about the four domains of family engagement and the key criteria that support meaningful family engagement in systems-level initiatives.

Moving Beyond the Family Engagement Check Box: An Innovative Partnership to Promote Authentic Family Engagement in Systems Change
By Family Voices and the Center for the Study of Social Policy (CSSP). Provides an example of the use of the Family Engagement in Systems Framework to engage families in a national initiative to transform pediatric practice and improve the social and emotional development of young children in the national Pediatrics Supporting Parents (PSP) initiative to promote the social and emotional development (SED) of young children.

The Family Engagement in Systems Assessment Tools: Case Studies to Highlight Three Uses of the Tools
This publication includes background information about the FESAT, and profiles three organizations that used the FESAT to ensure meaningful family engagement in systems change.

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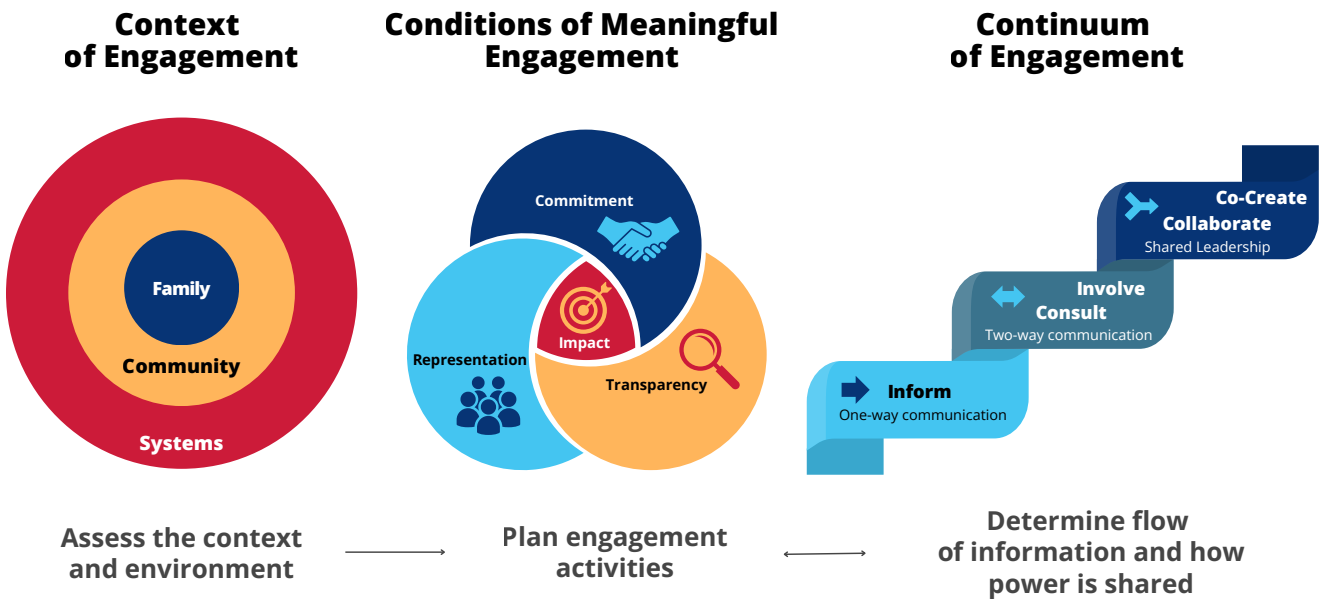
Framework for Youth and Family Engagement

Family engagement is an intentional partnership between families, youth, and health-related service providers across the systems of care. Family engagement is grounded in mutual respect, shared decision-making, and the recognition of the unique expertise that families and youth bring through their lived experiences.

Our evidence-based framework for family engagement includes three main areas of focus:

- The context and environment for engagement
- The four conditions that must be in place for meaningful engagement
- The flow of information and how power is shared



Together, the context of engagement, conditions of meaningful engagement, and continuum of engagement provide a tangible framework for ensuring continuous and sustainable engagement in which the voices of youth and families are heard and valued.

This framework can help organizations prepare for engagement, ensure their engagement is authentic and meaningful through assessment and planning, and be responsive and intentional about sharing information and power.

For more information, visit familyvoices.org/familyengagement.

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Getting Started with the Conditions of Meaningful Engagement

Commit to family engagement.
Create a family engagement policy that sets the expectation for engaging families as partners in all policy-making groups.

Build trust by being transparent.
Work with families to develop the information and support they need to participate and contribute as equal partners.

Understand why representation matters.
Engage families who represent the community your organization serves.

Document the impact of family engagement.
Work with families to report how their participation and ideas improved existing policies or helped in developing new policies.

Plan, assess and improve family engagement.
Download the complete set of Family Engagement in Systems Assessment Tools from Family Voices (familyvoices.org/FESAT). Contact our team for more information or to train your team on the tools by emailing fesat@familyvoices.org.

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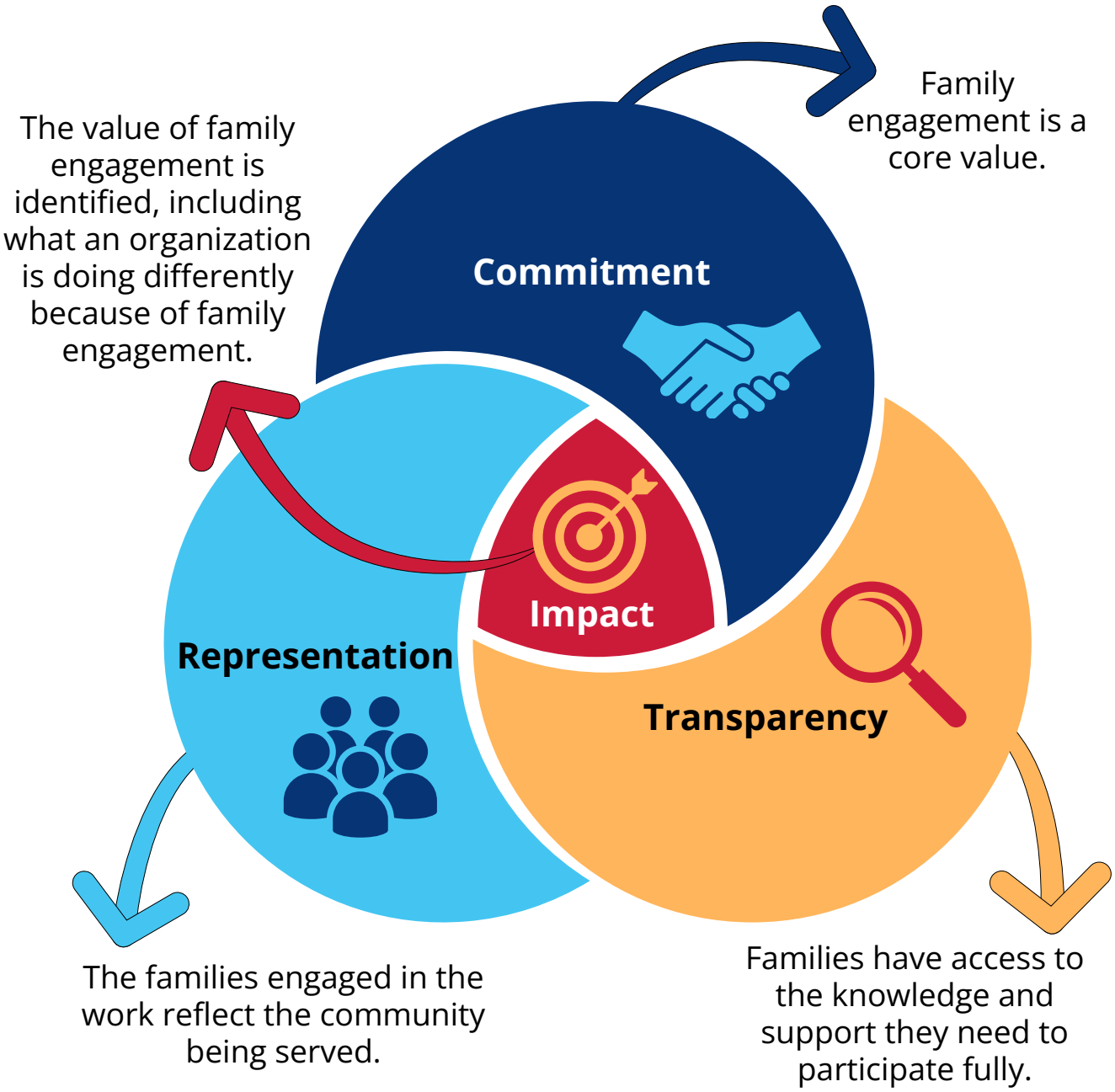
Conditions for Meaningful Engagement



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Is Your Team Ready to Engage Families?

Readiness Assessment for Family Engagement

Family engagement requires not only the desire, but also the structures, planning and leadership to sustain their involvement. Take our readiness quiz to find out how ready your organization or team is to engage youth and families in your work.

The Readiness Assessment is a growth tool. **There is no "bad" score**. The assessment helps your team understand the most appropriate pathway to continue your youth and family engagement efforts.

Each true statement is worth one point. Based on your answers to the 24 items in this readiness quiz, you will learn whether your team is at one of the following four levels of readiness: Baseline, Questioning, Interested, or Invested. After seeing where your team scores, take the next steps in building meaningful engagement plans; the goals is progress over perfection. You can use this form or take the online version.

- Our organization or team currently engages families or has a plan to engage families.
- Our team members have at least a minimal understanding of the processes behind family engagement.
- Families have shown interest in participating in initiatives and have support from our organization or team to engage.
- We have a staff member or champion assigned to support family leaders.
- Our organization has assessed the barriers to engaging families.
- Our organization has developed a plan to overcome the barriers to family engagement.
- Our organization or team recruits families to improve our policies or initiatives.
- The organization or team has a budget to compensate families.
- The organization or team has a budget for champions or mentors.
- The organization or team wants to recruit and work with families.
- The organization or team has a clear understanding of the value of families' perspectives.
- Families are included at early stages of our projects and initiatives and help to plan them.

- Families provide feedback about programs and initiatives that our staff and leadership develop.
- The organization or team partners with other organizations to recruit families that represent the communities they serve.
- Family engagement is promoted across the organization.
- The organization or team has one family leader we call upon consistently to participate in improvement efforts.
- The organization or team has multiple family leaders.
- The organization or team collaborates with others to improve family engagement.
- Engaging family leaders is part of our organization's mission and values.
- Our organization or team has representation from, and relationships with, community-based organizations.
- Our organization or team has policies that sustain family engagement, including fair compensation and consistent staff support for families.
- Family leaders have decision-making power to improve programs, policies, and services throughout our organization.
- Our organization or team reports outcomes to the families who participate in their initiatives.
- Our organization or team shares plans and strategies to improve family engagement with their community and the families they work with.

Total

Understanding Your Score

The levels – baseline, questioning, interested, and invested – can inform your efforts and help your team reach the next level of readiness for family engagement. Use After the Readiness Assessment to learn more about the next steps.

Baseline (<6 points)
Congratulations on starting your family engagement journey! As your team gets started, it's important to learn the principles of family engagement and what it will involve for your organization and team so you create a welcoming environment for families and a sustainable plan. Your team may need to develop policies, processes and supports to engage families in improving your systems and services. Begin with our Level 1 pathway.

Questioning (6-11 points)
Your organization wants to engage families but needs an action plan to get started and sustain your efforts. Developing a strategy for family engagement and creating internal structures to support it will help your team define how to engage families in your work. The Family Engagement in Systems Assessment Tools on the Level 1 pathway can help you take the next steps in your journey to engaging families meaningfully.

Interested (12-17 points)
Your team has a strong desire to work with families and gain their perspectives, and you may be ready to deepen that engagement. Making plans for how you will involve families at early stages of your work and compensate them for their expertise are your next steps toward embedding families in leadership roles and ensuring that engagement is reflected in your organizational values and policies. Use the Level 2 pathway materials to score the FESAT to plan your next priority.

Invested (18+ points)
Your team understands the value of family engagement and has developed infrastructure to support it. You have policies that sustain family engagement and you understand the power of family voices in improving your work. Although you are invested, your work isn't finished. You are ready to assess your effectiveness alongside the families involved in your work with our Level 3 pathway tools. Your team might focus on the Impact domain to build the capacity for long-term sustained engagement.

Find tools to plan, assess, and improve your family engagement efforts at www.familyvoices.org/FESAT.

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After the Readiness Assessment

Now that you've seen your Readiness Assessment scores, you can take the pathway that is right for your team or organization to plan, assess to improve family engagement. We've developed three distinct levels of preparation, with tools to support each level.

Baseline

- Use the Readiness Discussion Guide to facilitate conversations among your team on how to build capacity for youth and family engagement.
- Use the Family Engagement Checklist to discuss which steps your team can take action on as you build your capacity for engagement.

LEVEL 1

Questioning

In addition to the recommendations for Baseline above, your team can:

- Explore the FESAT Infographics and the FES Toolkit.
- Learn more about the evidence behind measuring family engagement by reading the articles and case studies on our Publications page.

Interested

- Read the FESAT User's Guide and complete FESAT scoring with your team. Tools in the FES Toolkit can get you started. Use the results to develop your engagement plans.
- You can request technical assistance from Family Voices on how to implement your engagement plans.

LEVEL 2

Invested

- Complete FESAT scoring with your team and use the results to develop your improvement plans.
- Use the Expanding Outcome Measurement guide to focus on advancing the *Impact* condition of engagement.
- Request "Making the Case for Family Engagement," a six-session sustainability training from Family Voices.

LEVEL 3

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Readiness Discussion Guide

Teams that score in the Baseline range on the Readiness Assessment often need to begin their engagement work by addressing mental models and infrastructure. This discussion guide is a starting point for creating the environment for sustainable and meaningful youth and family engagement.

What did we learn from the Readiness Assessment?

- Which areas were strengths for us?
- Which areas have we not thought about enough?
- What was surprising about our results?

Who needs to be at the table to build our capacity?

- Do we already have families we work with who can help us plan?
- Who are the partners we can work with who have this expertise?

Use the **Four Simple Questions** tool from Leading by Convening to help your team identify internal and external collaborators who can help you build your engagement infrastructure.

Use **Mapping Partnerships to Engage Families** to help your team identify existing groups, analyze organizations, map relationships and prioritize engagement.

What do we do next?

- What do we need to learn more about?
- Where do we feel stuck?

Family Voices offers training and technical assistance to support teams and organizations as they get started on building their engagement strategies. Contact us at FESAT@familyvoices.org.

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Family Engagement Checklist

The 20 items in the Family Engagement in Systems Checklist are the same as the 20 items in the Family Engagement in Systems Assessment Tool (FESAT). However, the response options are different.

The Checklist should be completed by organization staff who are first looking to engage families in systems-level work. The response options for the Checklist provide an opportunity for an organization to assess the supports they already have in place to engage families and their own staff and provides information about individual staff understanding of those supports.

Condition 1: Commitment	Yes	No	Some what	Don't know
The organization uses written policy that requires family engagement in systems-level initiatives.	☐	☐	☐	☐
The organization has one or more champions of family engagement.	☐	☐	☐	☐
The organization acknowledges the contributions family leaders make to systems-level initiatives.	☐	☐	☐	☐
The organization's budget includes funding for family leaders' time and/or other costs they incur (for example, travel, childcare).	☐	☐	☐	☐
The organization provides adequate time for staff to implement changes that result from family engagement in systems-levels initiatives (for example, educating staff about new policies).	☐	☐	☐	☐

Condition 4: Impact	Yes	No	Some what	Don't know
Organization staff listen to family leaders' ideas.	☐	☐	☐	☐
Organization staff engage family leaders in choosing goals for the initiative.	☐	☐	☐	☐
Organization staff work together with family leaders to implement the initiative.	☐	☐	☐	☐
Organization staff work together with family leaders to evaluate the initiative.	☐	☐	☐	☐
Organization staff use family leaders' input to improve the initiative.	☐	☐	☐	☐
Organization staff can explain how family leaders contribute to the initiative.	☐	☐	☐	☐

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Continuum of Engagement

Inform

Informing is the foundation of engagement. An organization, provider, or initiative shares timely, plain-language information with youth and families. Communication moves one way, with no built-in mechanism for families to respond, shape decisions, or influence outcomes.

Consult

Consulting is two-way information sharing; families respond, describe their needs and barriers, and inform improvement efforts, but the organization still decides. Consultation creates a feedback loop, but decision-making power generally stays with the organization, provider, or funder.

Involve

Involving youth and families empowers them to serve as key informants, advisors, reviewers, or representatives, contributing lived expertise at specific points in a process. They do not hold decision-making power and often are not told how their input shaped the outcome.

Collaborate

Collaboration means families hold leadership roles and help define needs, collect and interpret information, design strategy, and guide implementation. Collaboration is meaningful partnership, though final approval may still rest with funders, leaders, or boards.

Co-create

In Co-Creation, families and professionals share equal decision-making power across every part of an initiative: identifying priorities, designing the process, doing the work, evaluating data, and communicating outcomes. Co-creation requires intentionality, trust, time, and investment; it is not always possible, and it works alongside the other levels, not instead of them.

Adapted from Carman & Workman (2017)

Add Depth to the Way You Inform

Family engagement rarely stays at a single point on the continuum. An Inform-level activity grows stronger the moment families also have a way to respond, take on a defined role, help lead the work, or share real decision-making power... and none of that requires giving up what's already working. Layering in the rest of the continuum turns one-way communication into a more accountable partnership, and it's often what builds the trust that deeper engagement later depends on.

Consult

Give families plain-language information and ask for their reactions in simple ways: a comment box, a short survey, or a standing agenda item. This offers a chance for questions and concerns to come back. Even light-touch consultation shows families that the information they receive is a starting point for dialogue, not a one-way notice, and it surfaces problems while they're still easy to address.

Involve

Move beyond a general invitation to comment and give family reviewers a defined role: testing communications for clarity, flagging jargon, or checking that materials work across literacy levels and languages before release. Because the role is specific, involved reviewers catch issues a broad survey would miss, and their contribution is easier to track and credit.

Collaborate

Bring family leaders directly onto the team that decides what gets communicated and how, rather than only reviewing drafts after key choices are made. Their perspective on timing, tone, and format reshapes decisions upstream, and a seat on the team signals a level of trust that a purely advisory role does not.

Co-create

Share authority over the communication agenda itself, including what gets prioritized, how success is measured, and who is accountable for follow-through. This is the fullest expression of partnership on the continuum: families and the organization make these calls together, with equal standing, rather than the organization retaining final say.

Add Depth to the Way You Consult

Consultation is already two-way, but it doesn't have to stop at gathering reactions. The other points on the continuum each strengthen a consultation effort in different ways, from making sure families have the context to respond well, to giving them real authority over what happens with what they share. Moving toward these levels, even partially, makes consultation more meaningful and builds the relationships deeper engagement depends on.

Inform

Give families enough background, context, and plain-language information before asking for input, so their responses reflect real understanding of the decision at hand. Consultation without adequate framing risks collecting reactions to something families don't fully understand, which weakens the value of what comes back.

Involve

Ask family partners to help design the questions being asked, identify who should be consulted, and interpret what the responses mean once they're in. Involving families in the process itself, not just as respondents, produces better questions and a more accurate read of the results.

Collaborate

Include youth and family leaders on the team that reviews consultation feedback and recommends what to do next. Their presence in that room changes which findings get prioritized and helps ensure recommendations reflect lived experience, not just the loudest survey themes.

Co-create

Move beyond asking for input to sharing authority over how that input is used, what actions get prioritized, and how the organization is held accountable for follow-through. At this level, families aren't just consulted on a decision ... they help make it.

Add Depth to the Way You Involve

Involvement gives families a defined role, but a defined role can still grow deeper. Pair an Involve-level activity with the rest of the continuum by sharing more context up front, gathering broader input, extending real leadership, or shifting to shared ownership. This turns a single point of contribution into an ongoing partnership

Inform

Share the goals, timelines, and what is and isn't open to influence before asking families to take on a defined role. Reviewers and advisors do better work when they understand the boundaries and stakes of the process, and it avoids the frustration of investing time in feedback that was never actionable.

Consult

Gather broader input alongside the involved group so a handful of reviewers or advisors aren't the only family voices shaping the outcome. Wider consultation checks and enriches what involved participants bring, and helps the organization see whether their perspectives match others in the community.

Collaborate

Give family participants real leadership in shaping the work rather than a defined task handed to them after key decisions are already made. This can include a seat in planning meetings, a role in setting priorities. The shift from participation to leadership changes families from contributors to co-owners of how the work unfolds.

Co-create

Move from a defined role to shared ownership of outcomes, where families and the organization make decisions together and share accountability for results. This is the deepest point on the continuum, and it typically grows out of the trust an Involve-level relationship builds first.

Add Depth to the Way You Collaborate

Collaboration already puts families in leadership roles, but it still benefits from the rest of the continuum around it. Grounding a collaborative effort in information, broad consultation, and added lived-experience perspectives makes it stronger. Moving toward Co-creation extends shared leadership into shared, equal decision-making.

Inform

Keep every partner, staff and family leaders alike, grounded in the same data, goals, and challenges throughout the work. Collaboration breaks down when information is uneven, so treating every collaborator as equally informed is what makes shared leadership possible in the first place.

Consult

Stay accountable to the broader community by gathering input beyond the core collaborative team. Even strong family leadership on a team can drift from the experiences of the wider population it represents, and periodic consultation checks that the work still reflects real, varied needs.

Involve

Bring in additional lived-experience perspectives at key decision points, especially where the standing team's experience doesn't cover a particular need or population. Short-term involvement can add depth to a specific decision without requiring every contributor to join the collaborative team long-term.

Co-create

Move from shared work to shared, equal decision-making, where families and professionals hold the same authority over outcomes rather than families advising leadership that ultimately decides. This is the natural next step once a collaborative team has built real trust and a track record of working well together, if the environment allows true equal power sharing.

Add Depth to the Way You Co-Create

Co-creation represents full partnership, with families and professionals sharing equal decision-making power. Reaching that level doesn't mean the rest of the continuum falls away; sustaining a co-created initiative depends on continuing to inform, consult, and involve people at every level, so the partnership stays connected to the community it represents instead of narrowing to just the people already at the table.

Inform

Keep everyone informed in plain, accessible language, even once decision-making is fully shared. Co-creation can become insular if information stops flowing outward, so consistent, clear communication keeps the wider community connected to what the partnership is doing.

Consult

Stay connected to the broader community, not just the people at the table, by continuing to gather input from families who aren't part of the core co-creating group. This keeps the partnership's decisions grounded in a wider range of experience and guards against the group speaking only for itself.

Involve

Create defined entry points for more voices at specific moments: reviewing a plan, testing a tool, weighing in on a particular decision. Even when the core partnership doesn't need to expand, this lets new perspectives shape the work without requiring every contributor to take on full co-creation responsibilities.

Collaborate

Distribute leadership across more people and document decisions clearly, so the partnership's work can continue if any one person or family leader steps back. Sustained co-creation depends on more than one relationship. It’s about spreading leadership and keeping a clear record is what carries the work forward.

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FESAT 30-Day On Ramp

The FESAT is a practical tool to help your team reflect on your work to engage youth and families and plan for improvement. Here's a guide to help your team plan how to get started.

Week 0	Orientation video + "Who, When, How" guide
Weeks 1-2	Assemble team (with a named family partner).
Week 3	Hold a 60- to 90-minute working session to complete the scoring tool.
Week 4	Debrief + pick 1-3 improvement actions.

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FESAT Who/When/How Guide

This guide provides a simple, shared starting point for teams on who should complete the FESAT, how roles contribute, and what "scope" they should answer for—organization, initiative, or system.

Who should use the FESAT?

The FESAT is designed for teams, not individuals. The recommended FESAT scoring team size is at least 4 participants, with at least one family partner. Ideally, each FESAT scoring team includes a few core roles:

Role	Description	Why this role is needed
Team/Initiative Lead	Oversees the family engagement work within the program, initiative, or system.	Helps ground responses in current practice and identifies feasible next steps.
Family Partner / Family Leader	A family member with lived experience who contributes to planning, implementation, and evaluation.	Ensures authentic interpretation of items and helps assess meaningful engagement.
Program/Project Staff	Staff responsible for engagement activities, evaluation, or implementation.	Provides operational context, logistical details, and insight into barriers (e.g., time, staffing).
Facilitator (Optional)	FESAT coach or neutral team member who guides the conversation.	Supports navigation, reduces confusion, and keeps the group focused.

What each role contributes to the FESAT scoring process

Initiative Lead

- Reviews FESAT User's Guide
- Provides context for items
- Confirms scope choice
- Identifies feasibility of follow-up actions

Family Partner

- Offers lived experience perspective
- Assesses authenticity and relevance of engagement
- Flags unclear language and assumptions (a known challenge in the survey)

Program/Project Staff

- Adds detail on existing workflows
- Identifies operational barriers (e.g., time, staffing, funding)

Facilitator

- Ensures shared understanding of terms (e.g., "initiative")—a frequent user concern
- Keeps discussion balanced
- Helps translate insights into actions

When should teams use the FESAT?

Teams should complete the FESAT when they are:

- Launching new family engagement efforts
- Assessing or improving existing practices
- Preparing for strategic planning or grant reporting
- Reflecting across multi-organization initiatives

How to Define "Scope": What Are You Answering About?

Before teams get started with scoring the FESAT, they need to identify what entity they are assessing—especially in multi-organization collaborations. Use this decision guide to help define your team's scope.

Are multiple organizations partnering together?
If yes, choose one of the following approaches'

Option 1 — Initiative-Level Scope (Recommended for collaboratives)

You answer as a collective initiative, describing the shared engagement approach across partners.

Use when:

- Multiple organizations contribute to one shared project
- Roles and responsibilities are coordinated
- Partners co-design and co-implement engagement efforts

Option 2 — Organization-Level Scope

Each organization answers separately, describing its own practices.

Use when:

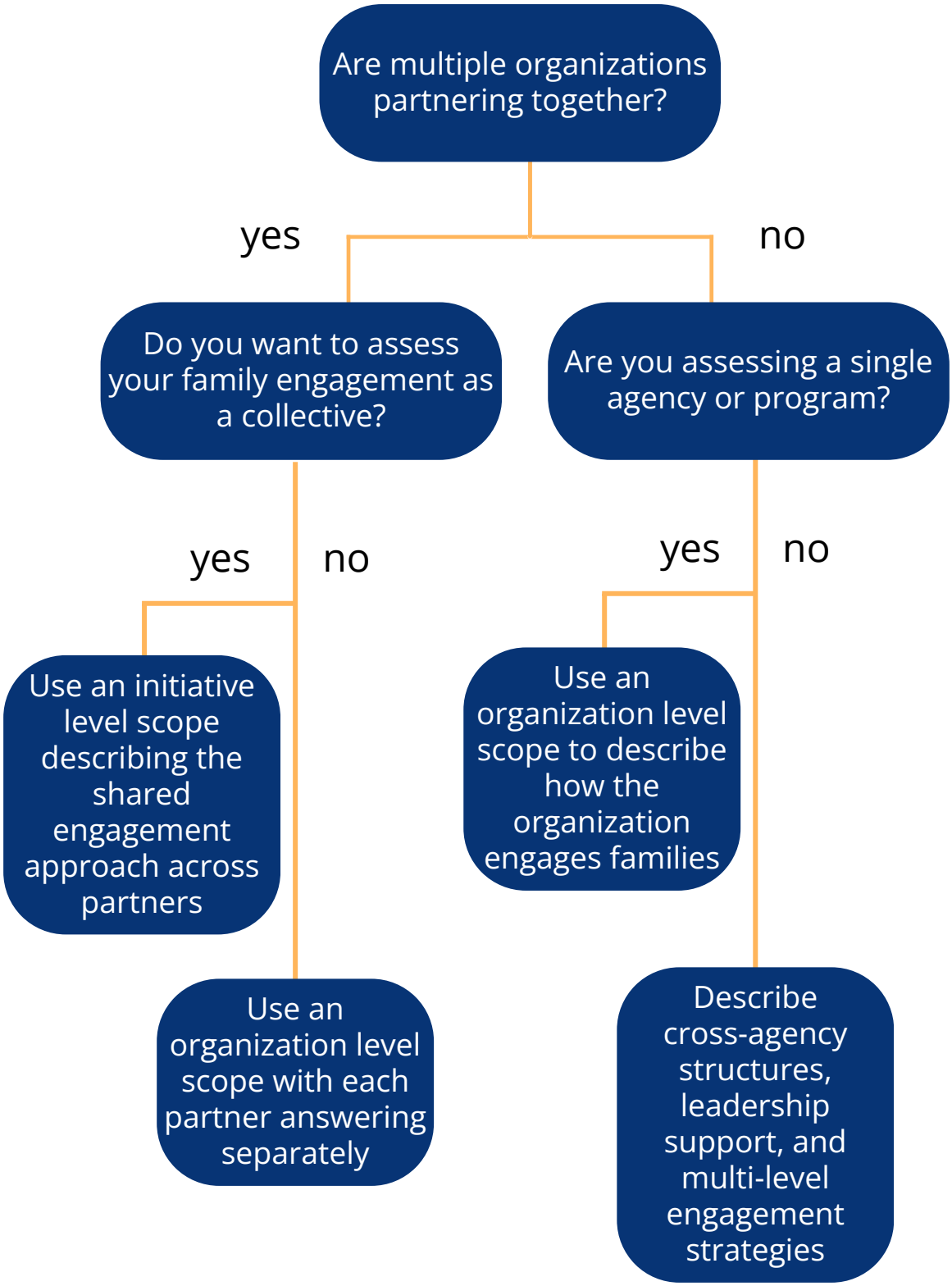
- Organizations operate independently under a broader umbrella
- Partners vary widely in readiness or role
- A central team wants to understand variation by site or agency

Are you assessing a single agency or program?
Use Organization-Level Scope.
Describe how your organization engages families—policies, practices, funding, partnerships.

Are you assessing a broader system (e.g., state Title V, Medicaid division)?
Use System-Level Scope.
Describe cross-agency structures, leadership support, and multi-level engagement strategies.

Choosing Your Scope

When you answer the FESAT scoring questions, what entity or initiative are you answering about?



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FESAT Scoring Quick Start Guide

Your team can score the FESAT in 60-90 minutes using this Quick Start Guide.

1 With the team you assembled, choose your scope using the decision tree. (5 min)

2 Review key definitions, confirm roles, and identify expected outcomes. (5 min)

3 Complete the FESAT together, using discussion to guide understanding. (40–50 min)

4 Identify 1–3 priority action areas based on scores and discussion. (10–15 min)

5 Assign owners and timelines, and plan to review progress at least once within the next month. (5–10 min)

If your team has more time or resources, read the FESAT User's Guide before Step 3. The User's Guide provides an introduction to the scoring tool and how to interpret the results.

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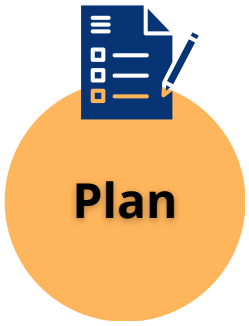
Three Ways to Use the FESAT



What should we do?

Child- and family-serving organizations can use the checklist in the Family Engagement in Systems (FES) Toolkit to establish family engagement processes.

- Identify supports already in place to ensure meaningful family engagement.
- Explore strategies and resources for additional ways to encourage and support family engagement.

How are we doing?

Families and staff can use the FESAT to learn whether families have the information and supports they need to participate, partner, and contribute to decision-making groups.

- Compare perspectives on how family engagement is going.
- Identify what is working well.
- Identify areas for improvement.

How can we do better?

Families and staff can use the FESAT and FES Toolkit to track progress in family engagement efforts.

- Complete the FESAT and use the results as a baseline score.
- Identify an area for improvement and select a strategy from the FES Toolkit that can help.
- Complete the FESAT again at scheduled intervals and compare results to the baseline.

Take the next steps.

Learn more about engaging families in systems-level initiatives by downloading and using the Family Engagement in Systems Assessment Tools from familyvoices.org/FESAT.

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FESAT in Action: Real-World Examples

What should we do?

A Title V program wanted to ensure meaningful engagement of families in the Title V Needs Assessment.

They used the Family Engagement Checklist in the FES Toolkit to identify supports that were already in place. They also identified ways to reach more families, such as:

- Provide stipends and transportation.
- Provide materials in multiple languages and formats.
- Hold focus groups in several neighborhoods at familiar gathering places in the community.

How are we doing?

A Medicaid program created a family advisory group and used the FESAT to assess how well they were engaging families.

Findings included:

- Families were involved in choosing goals.
- Families felt heard.
- Staff did not know whether and how they used family input.

How can we do better?

A children's hospital used the FESAT to improve family engagement in a 2-year patient safety initiative.

Staff and families:

- Completed the FESAT and used the results as a baseline
- Identified an area for improvement: to improve communication and partnership skills among staff and families
- Partnered with a family-led organization for leadership workshops
- Completed the FESAT again, compared new results to the baseline and saw improvement

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How to Use the FESAT

What should we do? How are we doing? How can we do better?

Before you begin using the FESAT

Read the FESAT User's Guide.

- Three uses of the FESAT
- How to score it
- How to use the results
- Sample uses of the FESAT
- Glossary of Terms

Use the FESAT Who/When/How Guide to identify the scope of the assessment, describe the initiative, and clarify each person's role in the scoring process.

Take the next steps.

Learn more about engaging families in systems-level initiatives by downloading and using the Family Engagement in Systems Assessment Tools from familyvoices.org/FESAT.

The tools provide a collection of strategies, resources and tools to help your organization improve the way you engage families in systems-level changes.

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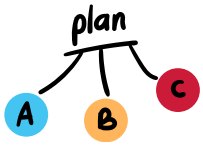
After Scoring the FESAT

Now that you've scored the FESAT, your team can make plans on what to do next. You can set goals and timelines, assign roles, and decide what additional supports you need.

Debrief

- Debrief with the scoring team and discuss what you learned from the scoring process.
- Work with family leaders to choose where you will focus your improvement efforts. You can choose to work on up to three areas in one domain, or choose up to three areas to improve across multiple domains.



Plan

- Plan, Do, Study, Act (PDSA) cycles are a way to address improvement. The American Medical Association developed an online toolkit to help organizations use PDSA cycles.
- Use The Family Engagement in Systems Assessment Tools: Case Studies to Highlight Three Uses of the Tools to learn how other organizations have used the FESAT.

Act

- Read the FESAT User's Guide and complete FESAT scoring with your team. Use the results to develop your engagement plans.
- You can request technical assistance from Family Voices on how to implement your engagement plans.

Rescore

- Complete FESAT scoring with your team and use the results to develop your improvement plans.
- Use the Expanding Outcome Measurement guide to focus on advancing the Impact domain of engagement.
- Request "Making the Case for Family Engagement," a six-session sustainability training from Family Voices.

Expanding Outcome Measurement

Advanced FESAT users often reach a point where they do well reflecting on opportunities and progress, but they want to build on what they find. This tool provides a practical approach for expanding how teams can document the impact of family engagement and outcomes that matter to families and systems leaders using a mix of qualitative and quantitative measures that are feasible in real-world settings.

Questions to Consider

- What changed because of how we engaged youth and families?
- What is better because we engaged youth and families?
- How did the organization or initiative benefit from engaging youth and families?
- How did children and families benefit from being engaged in our organization or initiative?
- How did children and families benefit because of our focus on family engagement in our organization or initiative?

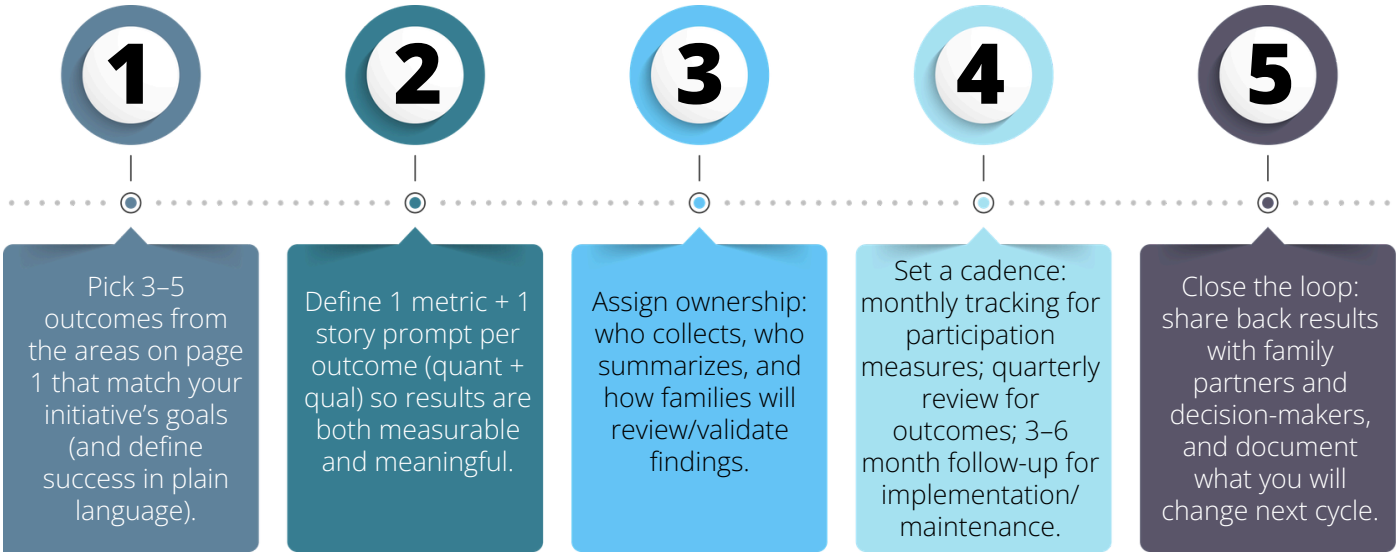
Outcome Areas to Measure

- **Family experience and trust:** Family partner satisfaction with engagement; perceived respect and influence; clarity of roles; psychological safety in meetings.
- **Representation and equity:** Number of family partners; demographics and lived experience represented; number of languages spoken by family partners; accommodations provided (childcare, interpretation, transportation) amount paid in stipends.
- **Influence on decisions:** Agenda items proposed by families; count/percent of recommendations adopted; decision logs that show how family input changed direction.
- **System/service changes:** New or revised policies/procedures; workflow changes; new materials or trainings co-developed with families; improved referral pathways or coordination practices.
- **Reach and participation:** Attendance and retention of family partners over time; number of families reached through engagement-informed improvements; participation across partner organizations (for multi-organization initiatives).
- **Capacity and sustainability:** Staff confidence/skills in partnering with families; budget lines for engagement; standing advisory structures; leadership sponsorship and succession planning for family partnership roles.

How to Collect Data

- **Mini pulse checks** (2–5 questions): After key meetings or quarterly (e.g., "I had meaningful influence today," 1–5 scale + one open text).
- **Decision and change log**: Simple running table documenting the decision, the family input, and the resulting change.
- **Participation tracking**: Attendance, retention, and representation (including language access and accommodations provided).
- **Short outcome stories**: 1–2 paragraph "what changed" narratives co-written with family partners, paired with 1–2 supporting metrics.
- **Follow-up checkpoints**: 3–6 months after completing a FESAT cycle to assess what was implemented and what improved.

Suggested Workflow



Tips for Advanced Teams

- **Be explicit about the "scope of analysis."** For each item and outcome, specify whether you are rating your organization, the broader initiative, or the larger system, especially when multiple organizations contribute.
- **Make results comparable over time.** Use consistent definitions and a simple scorecard (baseline, mid-point, end-of-cycle) so improvements are visible.
- **If benchmarking is desired, start internally.** Compare across sites/teams in your own network first (using the same definitions), then share aggregates externally when appropriate.

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LEVEL 3

Making the Case for Family Engagement

Funding family engagement in an organization often requires support from executive-level leaders, who need to understand the value and return on investment for sustainable family engagement. Making the Case for Family Engagement is a process for developing and delivering a successful case for support.

1 Introduction & Purpose

Understand the definition of family engagement and why you might need to make the case in your organization or initiative.

2 Develop a Framing & Problem Statement

Start assembling your pitch team and identifying how you will frame the need for family engagement.

3 Craft a Main Message

Begin setting a family engagement goal and a plan for your pitch, including your vision and key objectives.

4 Identify Your Audience

Develop your target audience based on who has influence and who can help you reach your key objectives.

5 Gather the Evidence

Bring together quantitative and qualitative data to support your objectives.

6 Develop an Ask

Determine what you are asking for in concrete terms.

7 Assemble Your Pitch

Use communication principles to put your pitch together in a way that will make sense and create positive responses.

8 Identify Your Messengers

Select the person or people who will deliver the pitch to your selected audience.

9 Prepare Your Pitch

Get ready to deliver your pitch by practicing, getting feedback, and revising based on how your audience might respond.

10 Set Up & Deliver Your Pitch

Set the date and the setting for the best outcomes.

11 Keep the Momentum

Keep going after the pitch is made. Maintain communication and offer more information.

For information about the six-session training series on Making the Case for Family Engagement, contact Family Voices at fesat@familyvoices.org.

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Conditions of Meaningful Engagement

Commitment

When family engagement is a core value, the policies of the organization reflect that value. Decision-making groups that are working to improve or create policies, programs and services should always include the families being served.

Develop a family engagement policy.

A family engagement policy sets the expectation for engaging families as partners in all systems-level policy-making groups to ensure that policies are family-centered.

Families should be paid for their participation, time and expertise. This promotes family participation and helps in recruiting a team that reflects the population served.

Find and support your champions.

Designate one or more members of your staff who want to lead the family engagement efforts.

Support the staff members in learning more about the value of meaningful family engagement and partnerships with families.

Take the next steps.

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Commitment

Strategies for Commitment

1. Create a written policy that requires family engagement in systems-level initiatives.
2. Ensure the organization has one or more champions of family engagement.
3. Provide mentoring and support to ensure families and staff understand their roles and can participate and contribute to the full extent possible.
4. Engage at least two family leaders in the initiative.
5. Develop a mechanism for reimbursing family leaders for their time and/or other costs they incur.

Tools and Resources for Commitment

Building a Family Engagement Policy is a tool from Family Voices that helps teams understand the elements of an effective policy for engagement.

The companion Family Engagement Policy Template offers language organizations can use to get started.

Findings from the Framework for Assessing Family Engagement in Systems Change include the importance of a champion of family engagement.

Work with your local Family Voices Affiliate Organization, Family-to-Family Health Information Center, or other community-based organizations to hear from a broad range of families.

Supporting Patient and Family Engagement: Best Practices for Hospital Leaders is an evidence-based guide developed by U.S. Department of Health and Human Services' Agency for Healthcare Research and Quality.

Guide to Patient and Family Engagement: Environmental Scan Report was prepared by the American Institutes for Research and documents the importance of having an internal champion as a strategy for implementing organizational change.

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Conditions of Meaningful Engagement

Transparency

Organizations should document how they identify the concerns of the families they serve. They should also be sure families and staff have access to the knowledge and support they need to participate fully in systems-level changes.

Identify issues and concerns.

Work with family-led or community-based organizations to learn what they are hearing from families, or reach out to families directly.

Work with families to create surveys, hold focus groups, find other ways to learn about the needs of the community. Use data from several different sources to develop your improvement plans.

Provide support and information.

Family engagement is more than just "checking the box" that they were present. Develop clear descriptions of how families will participate. Make sure families have information in plain language and in advance so they can prepare for meetings. Connect families to mentors who can help them learn how to use their experiences to improve systems for all children.

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Transparency

Strategies for Transparency

1. Partner with family leaders to conduct a needs assessment or other activities to identify and understand the issues children and families are facing.
2. Use data to learn about the issues and concerns that children, youth, and families are experiencing.
3. Use assessment and implementation tools to ensure proposed policies and other systems-level initiatives are equitable and culturally responsive.
4. Educate staff about new policies or practices.
5. Make sure all participants (family leaders and organization staff) have the information and supports they need to participate to their maximum potential.
6. Prepare and send meeting agendas and materials in advance so all participants know what to expect, and have an opportunity to add items they wish to discuss.
7. Provide mentoring and support to ensure families and organization staff understand their partnership role and are prepared to participate as fully as possible.
8. Ensure meeting materials are written in plain language and are culturally and linguistically appropriate for all participants.
9. Conduct polls to schedule meeting times, and provide multiple ways for attendees to participate.

Tools and Resources for Transparency

- Family Voices' Readability and Plain Language guide and Plain Language Checklist can help you develop effective family-facing communications.
- Creating a Role Description from Family Voices is a guide to helping families develop a clear understanding of what their engagement will look like. This document has a companion template.
- Onboarding Family Leaders, a guide from Family Voices, helps teams communicate effectively and clearly with family leaders joining an initiative.
- The Family-Centered Care Assessment for Families (FCCA-F) was designed for use by individual families to assess the family-centeredness of medical care their children receive.

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Conditions of Meaningful Engagement

Representation

Engage families who represent the community your organization serves. Consider including higher representation from families with specific experiences your initiative needs to understand or hear about.

Know the population data.

Use internal and external data sources to understand the populations your organization serves and the needs of the surrounding communities.

Connect with family-led organizations and community-based organizations to recruit and support family partners.

Offer training.

Provide opportunities for family partners and staff to build their skills. Learning opportunities might include:

- Workshops about family-professional partnerships and family engagement.
- Training so all participants are aware of how their beliefs and assumptions may affect the development of policies.

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Representation

Strategies for Representation

1. Use data to understand the population the organization serve.
2. Ensure the organization has one or more champions of family engagement.
3. Connect with community liaisons, cultural brokers, family-led or community-based organizations to help identify and support family leaders, including those from communities with which your organization wants to build trust and relationships.
4. Provide mentoring and skill-building opportunities for the families and organization staff who participate in systems-level initiatives.
5. Maintain awareness of personal beliefs and mental models when engaging families in systems-level initiatives.

Tools and Resources for Representation

Mapping Partnerships to Engage Families is a partnership mapping exercise to help organizations identify existing engagement groups, bolster collaboration, and address gaps in maximizing engagement.

Language Access resources from Family Voices provide expertise on language access services to use in different engagement settings.

Common Mistakes in Engaging Family Leaders helps organizations identify key actions to support retention of family leaders.

Four Simple Questions is an exercise from Leading by Convening that can be used to identify organizations and individuals who might work together on an issue.

Using the Interactive Data Query to Look at Subgroups is a guide to using the Data Resource Center's tool to stratify data queries by child and family demographics, adequacy of health insurance, health care access and quality, and more.

Henry J Kaiser Family Foundation Demographics and the Economy collates data on age, citizenship status, poverty rate, household income, homelessness, SNAP (Supplemental Nutrition Assistance Program), and more.

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Conditions of Meaningful Engagement

Impact

Work with families to report how their participation and ideas improved existing policies or helped in developing new policies. This information can be shared with organizational leaders and with family partners.

Listen to families and respect their expertise.

Make sure family partners feel welcome and have opportunities to speak up and share their ideas. Families know what works well for them and what doesn't in the systems of care that serve them. Listen to their lived experience.

Work with families to identify areas for improvement and find solutions to the challenges they experience.

Identify what has changed.

Recognize and document what families contributed to the work and what the organization is doing differently because of families' input and ideas.

Work with families to create an action plan to improve family engagement in systems-level changes in your organization.

Take the next steps.

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Impact

Strategies for Impact

1. Listen to family leaders' ideas and work together to implement the initiative.
2. Engage family leaders in choosing goals for the initiative.
3. Use family leaders' input to improve the initiative and document how family leaders contributed to the work.
4. Develop an Action Plan to improve family engagement.

Tools and Resources for Impact

Closing the Feedback Loop is a guide by Family Voices to help organizations and teams recognize, document, and communicate the impact of families' input and participation.

Expanding Family Engagement Outcome Measurement from Family Voices identifies specific ways to measure the impact of family engagement.

Family-Designed Outcome Measures describes one team's results when families led measure development, demonstrating the impact of family expertise on the team's work.

Making the Case for Family Engagement is a six-part live learning series from Family Voices that helps teams state the value of family engagement in their work and co-create a funding pitch with family leaders.

Condition 2: Transparency	Yes	No	Some what	Don't know
The organization conducts activities to understand the issues faced by the children and families they serve (for example, used data or conducted a focus group).	☐	☐	☐	☐
The organization ensures all staff and families have a clear understanding of the initiative they will work on together.	☐	☐	☐	☐
The organization provides the supports families and staff need to understand their partnership role (for example mentors/coaching).	☐	☐	☐	☐
The organization ensures all participants have the supports they need to participate in meetings (for example, physical access, interpreters, time away from other work responsibilities).	☐	☐	☐	☐
The organization ensures all participants have the information they need to participate in meetings.	☐	☐	☐	☐

Condition 3: Representation	Yes	No	Some what	Don't know
Family leaders are representative of the races and ethnicities of the populations served by the initiative.	☐	☐	☐	☐
Family leaders are representative of the cultures of the populations served by the initiative.	☐	☐	☐	☐
Family leaders are representative of the languages spoken by the populations served by the initiative.	☐	☐	☐	☐
Family leaders are representative of geographic areas in which populations served by the initiative live.	☐	☐	☐	☐