



# Engaging Patient and Family Advisors in your Projects and Planning: Shared Health's Patient and Family Advisor Network

Public, Patient, and Family Engagement

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# Welcome

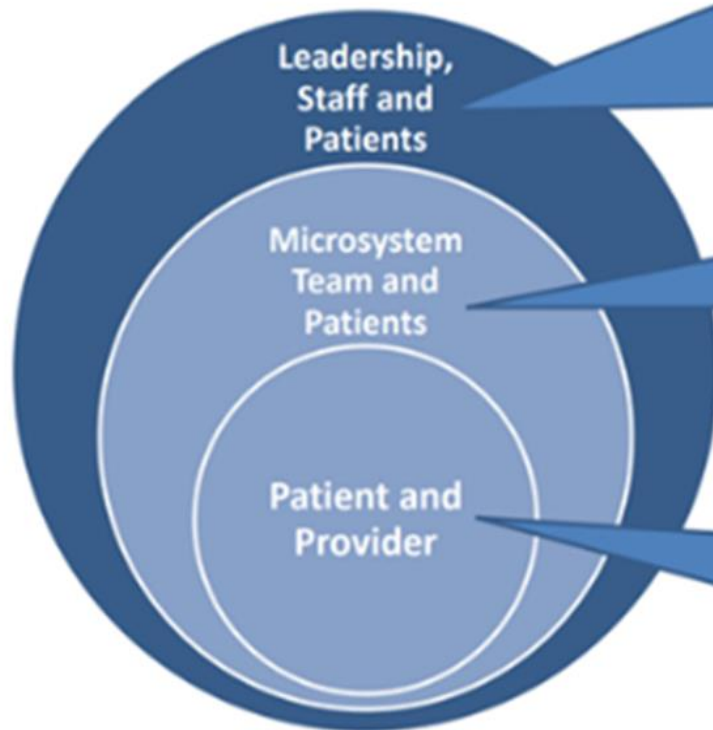
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# What does Engagement in Health look like?

- Engagement is the act of enabling and supporting patients, families, and members of the public to be active partners at all levels of the health system
  - in their own clinical care and self-management, and
  - by providing input into the decisions that shape and improve the quality of patient-care, health programs, policies, evaluation, and research.
- Patients provide unique insight into how they experience healthcare services, how these services affect their health, and how these services enable them to take control of their own health.
- The best approach to engagement in health considers three levels of engagement
  - Shared decision-making and self-management (real patient-centred care),
  - Engagement in program planning and quality improvement, and,
  - Creating a culture of engagement within the organization (embedding it in all aspects of planning and quality improvement)

# Three Levels of Patient Engagement



## A Culture of Engagement

### Engagement of leadership, staff and patients:

- Patient engagement is included in the organization's strategic plan at the corporate level; is linked to quality and safety, patient and staff experience; and is translated into action at the program level.
- Patients and families are woven into all activities of the organization.
- No decision is made that doesn't involve patients and families.

## Program Planning and Quality Improvement:

Patients and families are engaged in the planning, delivery, improvement and evaluation healthcare

## Shared Decision-making and Self-management:

Patients are engaged by their healthcare provider in shared decision making and self management .i.e. their own treatment

# Engagement in Health – The Basics

- Engagement is intentional. It is collaborative. When done well, it builds trust and health providers and patients learn from each other.
- Giving patients and families a voice in the delivery of care ensures that what matters most to them is part of treatment planning and decision-making.
- Their input can help drive improvement, innovation and responsiveness to create a health care system that will benefit everyone.
- We are developing processes and tools to embed engagement in planning and decision-making, CPSP project management, and quality improvement processes.
- Our team will address any barriers to participation that patients have so that we can connect and engage across all communities in Manitoba.
- Engaging patients, families and citizens in designing services and policy has become the gold standard in health systems world-wide. And, the benefits of engagement have become so apparent that engagement is now a requirement for accreditation.

# When is it Appropriate to Engage?



- To meet accreditation standards
- When you are putting together a strategic plan and feel that it is important to hear what is important to others
- If there is an issue of conflict/potential conflict between the organization and the community
- To ensure that the care provided is meeting your patients' needs
- Changing a program and/or the way that a particular service is delivered
- When there is impact on the larger community such as capital projects

# Planning an Engagement Activity



## #1 Figure out exactly what you want input on.

- Input on services from clients/patients in order to identify what is working well, not well, and get suggestions to improve?
- Input to help plan a new program or service, improve and an existing one, or develop a broader strategy?
- Input to better understand a health issue or health system issue from a patient/client perspective?



When you start the engagement planning process, make sure that you have the support and involvement of your team and leadership.

## #2 Who should be engaged?



### Brainstorm ideas:

- Current or past patients using a service?
- Family members, caregivers?
- Members of the community – targeted geographic community?
- Partner organizations?
- Health care staff?



Make sure you bring diverse voices to the table and your participants should reflect the diversity of your patient population.



### #3 What level of engagement are you going to choose?

- **Information Sharing** – provide information to assist in understanding the problem, alternatives, opportunities, and/or solutions
- **Consult** – to obtain feedback on analysis, alternatives, and/or decisions
- **Involve** – to work directly with clients/members of the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered
- **Collaborate** – to partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution
- **Empower** – to place final decision-making in the hands of the public

## #4 What are the options for how to engage? – Choosing an engagement approach/activity

Possible ways to engage:

- [Fast Feedback](#)
- Surveys
- Focus Groups/Consultations
- Key Informant Interviews (one on one)
- Patient/family member representation on committees
- Story Telling – or sharing of health care experiences
- Experience-Based Co-design - consult with patients, consult with staff – collaborate to plan
- On-going advisory councils/groups
- Planning workshops
- Community lunches/feasts



Work with the SH engagement team to identify a range of options and how they would work best with the patients that you are engaging.

## #5 Planning – when, where, and how (the specifics)

- In person versus virtual
- Best time of day
- Facilitator and/or staff liaison
- Processes to support participants - determine barriers and address. Some may include:
  - Interpretation
  - Travel expenses - parking, mileage, etc.
  - Child care/respite expenses
  - Compensation for their time and expertise
- How can you recruit the population needed?
  - [Shared Health Patient and Family Advisor Network](#)
  - Targeted recruitment



Figure out the natural links your team may have to that population – patients receiving the service, staff currently working with them, organizations that work with that patient population, etc.

## #6 Run the Engagement Activity

- Use an experienced facilitator
- Set clear goals, define their role and set realistic expectations
- Provide background context for the engagement, provide an orientation and encourage/support participation
- Facilitate and get input!
- Thank participants for their input and tell them what the next steps are
- Ensure the staff liaison follows up on any items and is a resource to them if needed



Don't underestimate the importance of creating a welcoming and supportive environment to the success of your activity. Participants need to feel safe in order to share their experiences and ideas.

## #6 Post Engagement Activity

- Use their input
- Let them know how their input was used – you will need to figure out the best way to communicate this with your participants at the event – via email, letter, etc.
- Evaluate the activity – staff and participants should complete an evaluation



# Patient and Family Advisor Network

- Virtual network comprised of individual patients, family members, caregivers and public interested in healthcare
- Currently have 67 Advisors on our roster from across the province
- Some of the work that Advisors have assisted with to date are:
  - Integrated Access
  - COVID Patient Flow Projects
  - Surgical and Diagnostic Back Log Task Force
  - Endoscopy TPI
  - Fast Feedback process on “It’s Safe to Ask” medication card
  - Patient/Family Advisor Network Advisory Group
  - Patient Rep on Patient Alliance for Healthcare Excellence Canada (HEC)
  - Patient Rep for Healthcare Excellence Canada Safety Conversation Action Series
  - Story Telling at ERS Program, Red River College Nursing Program and U of M Rady Faculty of Health Sciences
  - Capital projects – consultations/focus groups and one on one interviews

# How do I request an Advisor from the Network?

- Shared Health's Health Provider web page
  - Under Integration and Clinical Planning
  - Under Engagement
- Two types of request forms:
  - Full Support Service
    - Available to all Shared Health Programs and Departments, Service Delivery Organizations (SDOs) and Manitoba Health.
    - Shared Health's Public, Patient, and Family Engagement Team will provide support for recruitment, readiness, volunteer management, ongoing support and follow-up/evaluation of Patient and Family Advisors and your engagement activity

# How do I request an Advisor from the Network?

## Basic Support Service

- Eligible to all Full Support Service programs, but also to other health-care organizations, including those that are health research-based
- Shared Health's Public, Patient, and Family Engagement Team will:
  - Post the engagement activity/project on the Patient and Family Advisor Network
  - Share it with our Patient and Family Advisors who will be directed to their organization



# Unsure how to get started?

**Connect with us to set up a meeting to determine your engagement needs.**

Here's what we can do:

- Provide information/training for staff to incorporate public, patient, and family engagement in your planning
- Help plan engagement activities
- Co-facilitate engagement activities (e.g. focus group)
- Help develop public, patient, and family engagement surveys
- Recruit patients, family members, caregivers and the public to participate in engagement activities
- Obtain feedback from Patient and Family Advisors using the Fast Feedback process
- Help plan and facilitate experienced based co-design

# Contact Information

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# Additional Resources

- [Centre for Healthcare Innovation Patient Engagement](#)
- [Canadian Foundation for Healthcare Improvement Patient Engagement Resource Hub](#)
- [International Association for Public Participation](#)
- [Point of Care Foundation's Experience-based Co-design Toolkit](#)
- [Heard and valued Patient Engagement Guide from Fraser Health BC.pdf](#)

# Last Poll and Questions

