

PEP 101:

A Toolkit for Effective Patient Engagement at Markham Stouffville Hospital



*“Nothing
about me,
without
me”*

Adapted from the Alberta Health Services Toolkit and Health Quality Ontario Patient Partnering Framework

Produced in collaboration with Patient Experience Participants (PEPs) at Markham Stouffville Hospital

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BACKGROUND

The Value of Engaging Patients and Families

Why engage patients and their loved ones? An essential ingredient to high-quality healthcare is actively including the voice of the end-user to improve quality, safety and health outcomes. There is a growing movement within the Canadian public for patients and families to be involved in decisions about how healthcare services are designed and delivered.

▶ **Excellent Care for All Act (ECFAA) Legislation**

In 2010, the Ontario Government enacted the Excellent Care for All Act (ECFAA). This legislation aims to put Ontario patients first, by focusing on a high quality healthcare system that is accessible, appropriate, effective, efficient, equitable, integrated, **patient-centred**, population health focused and safe. This specifically includes engaging patients and families in the planning, design and delivery of health services.

▶ **Accreditation Canada (AC) Standards**

In 2016, Accreditation Standards were updated to include Client and Family-Centred Care (CFCC) as an explicit guiding principle for healthcare organizations. This includes mandating client and family representatives on advisory and planning groups, support for meaningful partnerships with clients and families, and a commitment to co-designing services.

▶ **Markham Stouffville Hospital (MSH) Corporate Strategy**

Our 2019-22 Strategic Plan details Markham Stouffville Hospital's commitment to become a Patient-Led Organization, which means achieving excellence in each component of Patient and Family Centered Care (PFCC). One of these components, Collaboration, focuses on engaging patients and families to co-design services, develop policies and evaluate essential programs. Acknowledging and valuing ideas from patients and families is part of our Honoured to Care culture, and expresses deep respect for patients who choose us for their care.

BACKGROUND

Best Practice Evidence

There is a growing agenda with international, national and provincial health care agencies to embed the voice of patients & families in health care planning, design and delivery. This is based on the evidence that engaging patients throughout the health care system improves quality, safety and health outcomes.



Canadian Foundation for
**Healthcare
Improvement**

In 2010 the Canadian Foundation for Healthcare Improvement began funding teams to investigate methods of improving the quality of care, effectiveness and efficiency of healthcare services by engaging patients in their design, delivery and evaluation.

The key findings were:

- Engaging patients is critical to understanding their experience of illness and care; this can lead to person centred changes in healthcare practice, service delivery and outcomes.
- Embedding patients in decision making structures within multiple levels of organizations will sustain real and ongoing patient engagement.
- The ability to demonstrate the positive outcomes of patient engagement related to effectiveness, efficiency and improved patient experience will ensure its sustainability.



INSTITUTE FOR PATIENT- AND
FAMILY-CENTERED CARE

According to the Institute for Patient & Family Centered Care (2013) engagement through Patient and Family Centered Care results in improved patient outcomes and patient safety, better teamwork to coordinate care and improved job satisfaction for care providers.



In Ontario, the Ministry of Health appoints a Patient and Family Advisory Council to advise the government on key health care priorities that have an impact on patient care and experiences. The Ministers' PFAC works to drive meaningful changes to provincial programs and policies, and helps inform health care plans in Ontario.

Patient Engagement at MSH

At Markham Stouffville Hospital, listening and learning from our patients, families and members of our local communities is an important part of our Honoured to Care culture.



Patient Experience Participants (PEPs) are specialized volunteers embedded within our hospital. They contribute in a variety of ways to help us deliver an extraordinary patient experience by sharing perspectives, opinions and providing input on decisions that improve quality of care. Founded in November of 2017, the PEP team has now grown to 27 members from diverse backgrounds representing Markham, Stouffville and Uxbridge communities.

PEPs are recruited through an intense process which includes application form, phone or in-person interview, reference checks, police screening and immunization. Members then complete a Volunteer Services Orientation, attend an in-depth PEP Program Orientation and are connected to a PEP Coach who is available for mentorship and guidance.

Through embedding the patient voice and presence throughout MSH, PEPs have active roles on councils, committees and working groups. Activities match individual skills and interests, and include:

- Participating in focus groups, working groups and project teams
- Membership in hospital councils and operations committees
- Developing patient and family education and informational material
- Participating in human resource interviews for new hires
- Input on corporate and departmental strategic plans
- Internal and external engagement, including participation in community fairs and exhibitions

Patient Declaration of Values

The purpose of the MSH Patient Declaration of Values is to articulate patients' and families' expectations of our hospital and health care system. This was adapted from the Ontario Patient Declaration of Values and developed in consultation with our Patient Experience Participants (PEPs). The Declaration is intended to serve as a compass for our organization and reflects a summary of the principles and values that patients and families say are important to them.

As patients, we expect:

DIGNITY AND RESPECT

- Individual identity, beliefs, history, culture and ability will be respected in patient care.
- Patients will be treated in a manner free from stigma and assumptions.
- Health care providers will introduce themselves and identify their role in care.
- Health care providers will act with empathy, kindness, and compassion
- Families and caregivers will be treated with respect and seen as valuable contributors to the care team.
- Health care system providers and leaders will understand that their words, actions and decisions strongly impact the lives of patients, families and caregivers.
- There will be equal and fair access to the health care system and services for all, regardless of language, place of origin, background, age, gender identity, sexual orientation, ability, marital or family status, education, ethnicity, race, religion, socioeconomic status or location.

INFORMATION SHARING

- Personal health information will remain private, respected and protected.
- Individualized care plans will acknowledge patients' unique physical, mental and emotional needs.

There will be open and seamless communication about patient care.

- Patient health records will be accurate, complete, available and accessible upon request.
- There will be a transparent, clear and fair process to express a complaint, concern or compliment about care, and it will not impact the quality of the care received.

PARTICIPATION

- Patients will be recognized as part of the care team and be proactively and meaningfully involved in conversations, options and decisions about their care.
- Providers will encourage patients to participate through open dialogue, recording notes, questions and discharge information.
- The healthcare team will be accountable and supported to carry out their roles effectively, and in compliance with professional responsibilities.
- Patients will feel empowered through understanding their own Role in Patient Safety.
- Providers will act with integrity by acknowledging their abilities, biases and limitations.

COLLABORATION

- Patient and family experiences and outcomes will drive the accountability of the organization and those who deliver services, programs, and care within it.
- The health care culture will value the experiences of patients, families and caregivers and incorporate this knowledge into policy, planning and decision making.
- Patients will have opportunities to be included in health care policy development and program design.
- The Patient Experience Participant (PEP) program will experience growth annually and represent the demographics of the local community.

Note: *The Ontario Excellent Care for All Act (ECFAA) requires all hospitals to have a publicly available patient declaration of values, produced in consultation with the public. This Declaration is not intended to establish, alter or affect any legal rights or obligations, and must be interpreted in a manner that is consistent with applicable law.*

Spectrum of Engagement Approaches

What does it mean to engage patients & families? Consider where on this spectrum you would like to engage PEPs in your project or service:

Adapted from the HQO Patient Partnering Framework

ACROSS A SPECTRUM OF PARTNERING APPROACHES



Share corporate updates, status reports and relevant quality and safety data	Conduct focus groups, send surveys, ask for feedback and document review	Provide detailed background, invite for participatory decision making, engage as part of advisory committees	Engage in operations committees, as part of working groups, in project teams, and for policy development and program design
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TOOLS FOR PROVIDERS



Making the Decision to Engage

You may have more than one reason for wanting to engage PEPs in an activity or decision-making process. Be aware that the more complex and multi-faceted the decisions are, the more ambitious and resource intensive your engagement plan will need to be.

Before you begin, as a team discuss these questions:

- What is your reason for wanting to engage a PEP?
- Are you clear on what issues or concerns you're trying to address through this initiative?
- Has this initiative involved PEPs in the past, if so what have been the implications of this?
- What support do you have from leadership to ensure this is successful for the duration of the initiative?
- What other stakeholders will need to be engaged in this initiative?
- Does your team see the value and benefit to partnering with PEPs in your work?

Is the scope and intended goal of your project or engagement activity:

- To improve service design and/or the process of receiving care?
- To ensure appropriate treatment and care?
- To improve health outcomes?
- To reduce risk factors and prevent ill health?
- To improve safety or patient experience?
- To set priorities for action or strengthen accountability?
- To ensure access to treatment?
- To improve transitions between services?

If you cannot say "yes" to any of these broad goals, please reconsider your current plan for engaging a Patient Experience Participant.

Supporting Collaborative Relationships

Successful engagement requires a commitment to developing and supporting a strong partnership between all stakeholders. Mutual respect, trust, honesty, equity, dialogue and negotiation are essential elements for successful collaboration. Relationships look different depending on the level of engagement and method of engagement.

Patient engagement is an opportunity to create a third space where the focus is on the 'we' and not on patients, the system or providers. Through engagement the expertise and experience of all stakeholders can be heard and acted on.

What Does a Collaborative Relationship Look Like?

- Mutual respect for skills and knowledge
- Honest, timely and clear communication
- Understanding and empathy
- Mutually agreed upon goals
- Shared planning and decision making
- Open two-way sharing of information
- Accessibility and responsiveness
- Joint evaluation of progress and successes
- Absence of labeling and blaming



Requesting a PEP

If you would like to request a PEP, please complete the **PEP Request Form** available on the corporate Intranet and submit to the Patient Experience Department through patientexperience@msh.on.ca. It is recommended your request be made *four weeks* prior to your event to allow for the request to be processed.

The PEP Request Form will prompt you to list the following:

1. Provide a brief introduction and context on your project/task
2. What specific issues would you like PEP input or feedback on?
3. Is there anything else you would like potential advisors to know about your initiative?
4. Information on scheduling and time commitment:
 - anticipated start date and end date, location and length of meetings
5. What activities will PEPs have to complete between meetings? How much time will these activities require?



Once a PEP is assigned to your request, a member of the Patient Experience Department will inform you and provide contact details.

Don't leave them hanging! Communication is key.

Reach out to the assigned PEP member, provide clear background information, and let them know when to expect more details about their assignment.

Tips for Success

BEFORE:

- ☑ Get to know PEP members and their personal experiences, backgrounds and skill sets
- ☑ Find meeting times and locations that are convenient for the majority of attendees
- ☑ Provide detailed background information about initiatives, and clearly state what you hope to achieve
- ☑ Send the agenda and minutes, providing ample time for review in advance
- ☑ Prepare staff by asking them to identify ways to support collaboration with PEPs

DURING:

- ☑ Introduce committee members with a brief description of each members role
- ☑ Re-iterate your goal for having the PEP member present
- ☑ Engage the advisor throughout the meeting to ask for their input on topics of discussion

AFTER

- ☑ De-brief with your PEP immediately following the meeting if possible
- ☑ Anticipate they won't be able to attend all meetings; follow up to let them know that their presence was missed and their participation is valued
- ☑ Ensure members are notified of last minute changes/cancellations to meetings or projects and *be aware that different email servers may be incompatible with MSH-based calendar invites*. Always follow up with a phone call or email to ensure changes to meeting series are received as intended.

TOOLS FOR PEPS



Making it Meaningful

As a Patient Experience Participant, your role is critical to the success of the engagement process and outcomes. Always take the time to determine whether the potential engagement activity will be meaningful for you.

Consider asking staff the following questions when you are considering an engagement opportunity:

- ▶ Why have you chosen to include a PEP in this initiative?
- ▶ What are the goals of this activity?
- ▶ What skills, background, or experiences are you looking for from an advisor?
- ▶ How will my input and feedback be utilized, and shared with others?
- ▶ How will updates about the initiative be shared with me?
- ▶ How will you prepare other team members for the inclusion of the PEP voice?
- ▶ How often and when will we re-examine my commitment and make adjustments?
- ▶ Who will I go to with questions, and if I need more support?

Tips for Success

As you proceed in your role as a Patient Advisor, it may be helpful to keep the following tips in mind:

- ☑ Always believe the patient and family perspective is *important* and *needed*
- ☑ Do your best to understand and lead the issue from the patient and family perspective during engagement activities
- ☑ Attend meetings as previously agreed or let the contact person know when you are not able to attend
- ☑ Spend time getting to know team members, dynamics and corporate culture
- ☑ Provide information about your preferred way to communicate and your availability beyond agreed-upon times
- ☑ Communicate your expectations about the outcomes and benefits of engagement
- ☑ Share your feedback openly and frequently, with the project team and other PEP members
- ☑ Take advantage of learning opportunities!



From Advisor to Teammate

Our PEP Coach *Anne Rouillard* has been an active member of the PEP Program since its inception, and shares some valuable words of wisdom below:



“In 2017 I became one of the first Patient Experience Participants (PEPs) at Markham Stouffville Hospital, so I have seen the progression of the PEP program throughout the hospital and beyond the hospital walls in the community.

“To those who endeavor to become a PEP it is important to be professional, a good listener, and do your homework to allow for co-operative engagement. Beyond all of these pre-requisites my basic advice and observations are simple, have an open mind and an open heart. Remember to be guided by your internal compass to consistently improve and refine policy and procedure for the betterment of patients their families and for staff.”

The Staff Perspective

Professional Practice Leader *Nikki Roberts* has worked with Patient Experience Participants across numerous initiatives over the past three years. Below, she shares the staff perspective on the importance of including the patient and family voice:

“I have had the good fortune of working with multiple PEPs at MSH on a variety of projects. I have found the most successful relationships have been with PEPs who have some flexibility to be available to attend scheduled meetings, who have the confidence to share their perspective during meetings, and who are able to share their opinions and expertise in a non-judgmental way.

“I have found engagement of the PEPs in providing feedback on patient education materials to be especially helpful. For example, they were invaluable in contributing to and guiding the development of falls posters and brochures for patients and families to ensure that the language and images used are easily understood by patients.

“Having a PEP at the table helps to ensure that the work being done in the hospital doesn't lose sight of the ultimate reason we are here – for the best possible health outcomes for our patients.”



Additional Resources:

Markham Stouffville Hospital *2019-2022 Strategic Plan*

<https://www.msh.on.ca/about-us/strategic-plan-2019-2022/strategic-pillars>

Ontario Ministry of Health and Long-term Care *Patient Declaration of Values*

<https://files.ontario.ca/moh-patient-declaration-of-values-for-ontario-en-2020-06-19.pdf>

Health Quality Ontario *Glossary of Healthcare Terms for Patient and Caregiver Partners*

<https://hqontario.ca/Portals/0/documents/pe/glossary-resource-en.pdf>

International Association for Public Participation (IAP2) *Spectrum of Engagement for Public Participation*

https://iap2.org.au/wp-content/uploads/2020/01/2018_IAP2_Spectrum.pdf

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Thank you!

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