



# Ingredients for successful patient engagement:

## Meaningful recruitment of patient and family advisors

### KEY MESSAGES:

- » Engaging patient and family advisors is integral to improving the quality and safety of the healthcare system.
- » Effective engagement occurs when patient and family recruitment is contextual to the challenge or opportunity.
- » Recruitment of patient and family advisors can be done successfully using a variety of methods.
- » Meaningful engagement flourishes when resourced appropriately (financial and human).

### INTRODUCTION

Hearing the voices of patients, families and caregivers is essential to transforming healthcare. In 2010, the Canadian Foundation for Healthcare Improvement began funding teams to investigate methods of improving the quality of care and the effectiveness and efficiency of health services by engaging patients in their design, delivery and evaluation. Funded teams were required to evaluate their intervention's patient engagement processes, outputs and outcomes, including its impact on the quality of services. In May 2012, six months prior to the end of their two-year funding cycle, the first cohort of the teams came together to begin to articulate lessons learned from these projects. This series of briefs presents the themes that arose and shares lessons learned to date in each of these areas.

One of the themes that emerged from the discussion is the importance of meaningful recruitment in the patient engagement process. Appropriate, meaningful and ongoing recruitment can contribute to building capacity within the organization by retaining the expertise of skilled patient and family advisors. Successful recruitment allows for a wide range of available patient and family

The Canadian Foundation for Healthcare Improvement is dedicated to accelerating healthcare improvement and transformation for Canadians. The Patient Engagement Projects initiative supports project teams to improve the effectiveness and efficiency of health services by engaging patients and families in their design, delivery and evaluation.

advisors for a multitude of engagement opportunities. Each patient engagement opportunity is unique and requires a patient and family advisor who is equally unique in his or her skills, experience and lifestyle. With a large base of recruited patient and family advisors, sustainability of patient engagement activities is more easily achieved. In addition, success is more likely when the right people are involved.

Appropriate and meaningful recruitment contributes to the retention of patient and family advisors and builds strong relationships, where patients feel valued, and supports transformation within the culture of the health system, organization or facility.

A flexible recruitment process is needed to meet the diverse needs of both the patients and families who are willing to volunteer their time and expertise and the engagement opportunity. When both these needs are met, organizations achieve the “we” that is necessary to work together to help improve the health services available and provided in Canada.

Effective recruitment of patients and families can result in successful patient engagement that, in turn, can help:

- » reduce healthcare costs
- » support the provision of more appropriate, better quality and relevant services
- » improve the patient and staff experience
- » improve health outcomes

## **PROMISING PRACTICES TO ACHIEVE REAL ENGAGEMENT**

There are many methods one can use to successfully and efficiently recruit patient and family advisors. The following were found to be promising practices in effective recruitment:<sup>1</sup>

- » Use multiple methods for recruitment
- » Ensure diversity of participants
- » Ensure a good fit between advisor and opportunity

### **1. USE MULTIPLE METHODS FOR RECRUITMENT**

Recruitment can come from a number of sources; each has its strengths and weaknesses and each has its place in the recruitment process. Peers are effective recruiters, whether other patients and family members, networks and groups of patients and their families, patient reunion participants or community and other leaders. Care providers and patient relations departments within healthcare organizations are also effective recruiters. All of these potential recruiters, however, need appropriate support if they are to be effective. That support can include knowing what opportunities are available and what kinds of qualities patient and family representatives should demonstrate.

As well, media, both traditional and new, offer recruitment opportunities, whether in the form of print advertisements or notices in hospitals and clinics, community newspapers and the like; public service announcements on radio or television; or Tweets, Facebook postings and other forms of new media.

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<sup>1</sup>See also the approaches identified by the Institute for Patient- and Family-Centered Care, in Jeppson, E. & Thomas, J. (1994). *Essential Allies: Families as Advisors*. Institute for Patient- and Family-Centered Care, Bethesda, MD.



### *Strategy in action*

When recruiting participants for a survey, St. Joseph's Healthcare<sup>2</sup> in Hamilton used different methods to ensure a high rate of participation. They built awareness of the study using radio interviews, posters and focused presentations/information sharing with hospital leadership, clinical teams and community service organization such as Good Shepherds. Following this stage, they then used a three-step process that involved identifying the best mental health clinics for recruiting, speaking with leaders at those clinics on the best (and most appropriate) methods for recruiting patients and families and validating these approaches with front-line staff. To maintain a balance between patients and families among survey respondents, the research team also identified and contacted family-support groups in the community, encouraging their members to complete the survey. Their efforts resulted in 283 completed first-round surveys and 340 completed second-round surveys.

## 2. ENSURE DIVERSITY OF PARTICIPANTS

Choosing the right representative for the right opportunity can be a difficult task, made more difficult by the need to include those from diverse and hard-to-reach groups. This can be particularly important at a system or province-wide level. Participants in patient engagement initiatives at this level should come from a broad range of backgrounds and represent diverse genders, expertise, socio-economic levels and demographics. Consideration may need to be given to ensuring that participating in patient engagement initiatives does not create financial hardship, particularly for those living in rural or isolated communities or from lower socio-economic groups, or that lack of resources does not prevent their participation. Re-imbursement of out-of-pocket expenses, such as transportation or child care, is one option, as is potentially paying participants an honorarium.



### *Strategy in action*

The British Columbia Ministry of Health Services<sup>3</sup> wanted to recruit a diverse range of community members in the Fraser Health Region. To ensure success, the Ministry translated patient surveys into multiple languages, including Punjabi and Chinese. Additionally, the 'Your Voice Counts' workshop curriculum developed by the patient engagement team is being adapted for use with the Chinese and Punjabi communities and the team is drawing on input from these group to guide the cultural adaptation process.

## 3. ENSURE A GOOD FIT BETWEEN ADVISOR AND OPPORTUNITY

When recruiting patient and family advisors, it is important to ensure that they are interested in contributing to the greater good and aware of the time commitment and expectations when choosing to participate.

<sup>2</sup>See "Patient input on developing early intervention mental health services" at St. Joseph's Healthcare / McMaster University [www.cfhi-fcass.ca/WhatWeDo/Collaborations/PatientEngagement/Projects2010.aspx](http://www.cfhi-fcass.ca/WhatWeDo/Collaborations/PatientEngagement/Projects2010.aspx)

<sup>3</sup>See "Your Voice Counts: Training patients to be effective in designing the system" BC Ministry of Health Services [www.cfhi-fcass.ca/WhatWeDo/Collaborations/PatientEngagement/Projects2010.aspx](http://www.cfhi-fcass.ca/WhatWeDo/Collaborations/PatientEngagement/Projects2010.aspx)

Once potential participants have been identified, ensure they are a good fit for the task and that the task at hand is a good fit for them. Prescreening and interviewing potential participants can help in this process. Prescreening can come from others in the system who have had contact with the potential advisor. Interviewing should be done using a set of predetermined questions appropriate to the engagement opportunity. Background checks, including criminal record checks and resume/credentials checks, may also be appropriate. A confidentiality agreement should also be signed, based on context and level of engagement.



### *Strategy in action*

In putting together its Patient and Family Advisory Council (PFAC), Cancer Care Ontario<sup>4</sup> went through a few key steps to ensure Council members were appropriate to the task and that they would be adequately prepared. First, interested participants were asked to complete a baseline questionnaire to aid in the selection process. Selected participants were then asked to attend a two-day training session before attending the first PFAC meeting. The training session included a detailed orientation package that contained the goals and objectives of the PFAC, general tips on how to function as a member and additional materials to help them become effective members of the PFAC.

## CHALLENGES TO EFFECTIVE RECRUITMENT

Challenges to meaningful engagement include the fact that on the one side, patients and family members and on the other side, healthcare providers and leaders, may not be willing to participate, due to being unclear about such things as involvement expectations or the role one might play. Simple lack of familiarity can also play a role, as both patients/families and staff may not have worked in this capacity before and thus be hesitant to participate.

Another barrier or consideration when undertaking recruitment of patient and family advisors is that there may be resistance to change and adherence to a paternalistic medical model, as opposed to the patient- and family-centred care approach personified in the patient engagement process.

Other challenges to effective recruitment can include difficulties finding patients and family members willing to participate; freedom-of-information and privacy issues; inadequate resources, whether financial or temporal; and lack of human resources to carry out recruitment.

## CONCLUSION

Health system improvement involves a variety of components, key among which is accommodating the views of a diverse group of stakeholders. As healthcare organizations continue to search for more efficient methods of reducing the cost of healthcare delivery, improving the experience of patients and staff and improving health outcomes, the involvement of patient and families will be integral to their success. Patient and family engagement is an art; it requires dedication, innovation and humanity. We can do anything when we work together.

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<sup>4</sup>See “Engaging survivors to improve patient experiences throughout the cancer journey” at Cancer Care [www.cfhi-fcass.ca/WhatWeDo/Collaborations/PatientEngagement/Projects2010.aspx](http://www.cfhi-fcass.ca/WhatWeDo/Collaborations/PatientEngagement/Projects2010.aspx)

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