



Ingredients for successful patient engagement:

Clarity of purpose

KEY MESSAGES:

- » Clarity of purpose ensures a good fit between objectives, stakeholder motivations and the strategies used to involve them.
- » Clarity of purpose makes optimal use of time and resources.
- » Clarity of purpose assists in evaluating initiatives.

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 establishing clarity around the purpose of the initiative(s) being undertaken.

PROMISING PRACTICES FOR ACHIEVING CLARITY OF PURPOSE

Articulating clear goals and expectations at the beginning of a patient engagement initiative helps clarify who should be involved, what will be done and why and builds support from multiple stakeholders. The following practices have been found to be particularly promising for ensuring clarity of purpose:

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.

1. ENSURE SPECIFIC INITIATIVES ALIGN WITH ORGANIZATIONAL OBJECTIVES AND MEET PATIENTS' NEEDS

Few initiatives exist in isolation. An individual initiative to enhance patient engagement likely exists within a larger institutional commitment to improve the patient experience. Each initiative must align with and re-inforce that larger framework. In addition, initiatives need to actually meet the needs of patients. To that end, the process of establishing goals and objectives should be a collaborative process, with patient involvement from the very beginning. Ensuring that goals and objectives align with the larger institutional framework and meet the needs of patients will help to ensure that all stakeholders understand and support the initiative.



Strategy in action

In 2009, the Glenrose Family Advisory Network¹ (GFAN) identified the Family-to-Family Connections Program as a priority. At first, the GFAN had a clear concept for the program that would use a matching process to pair up parents with similar needs to provide advice and support to each other. But after speaking to parents, it was clear that this approach was far too prescriptive for the community. Parents were most interested in opportunities to meet other parents (more than just one) on their own terms, and wanted the freedom to make their own connections. As a result, the proposed matching model was modified to allow for a shared space and time for groups of parents to come together, resulting in an experience for parents that was 'extremely positive' and 'a breath of fresh air.'

2. COMMUNICATE CLEARLY AND CONSISTENTLY ABOUT THE AGREED-UPON PURPOSE

Regular, clear and consistent communication about the purpose of an initiative ensures that the interests and objectives of all stakeholders (patients, staff and leaders) are aligned over time. This also contributes to clarity about adjustments to the strategy as new information arises. Because people are often overloaded with information, it is important to package and explain patient engagement efforts in attention-grabbing ways to achieve awareness and buy-in.



Strategy in action

The Centre for Addiction and Mental Health² (CAMH) was bringing back former patients to talk about their experience of recovery after leaving the schizophrenia inpatient units. The program's success, however, was dependent on staff support. CAMH communicated clearly and effectively with staff to achieve that support. The communication took two forms—first, CAMH communicated the excitement of the opportunities, with presentations, one-on-one discussions and promotion in the CAMH newsletter to generate enthusiasm. But it also made it clear through its communications that this was a mandatory part of staff development, making its expectations clear from the beginning.

¹See "Multifaceted parent-to-parent support program within a Family Support Network" at the Glenrose Rehabilitation Hospital www.cfhi-fcass.ca/WhatWeDo/Collaborations/PatientEngagement.aspx

²See "Bringing a recovery focus to schizophrenia services through client narratives" at the Centre for Addiction and Mental Health www.cfhi-fcass.ca/WhatWeDo/Collaborations/PatientEngagement.aspx

3. DETERMINE THE ROLE OF PATIENTS AND THEIR LEVEL OF INVOLVEMENT

Patients and families, as well as healthcare organizations, have different motivations to participate in engagement initiatives. Engagement activities also take place at different levels of an organization, ranging from individual patient care to the organization as a whole or, indeed, across the entire healthcare system. The International Association for Public Participation has developed a spectrum of public participation,³ outlining goals, commitments and techniques across a spectrum of participation, from inform and consult, to involve, collaborate and empower. Positioning patient engagement initiatives along this spectrum can assist in determining who should be involved and what they are being asked to do.



Strategy in action

Given the challenges of engaging patients in a forensic mental health setting, the BC Forensic Psychiatric Hospital⁴ (FPH) patient engagement team knew it needed to take a holistic approach to engaging patients, spanning a range of processes from research to decision-making. Thus the FPH decided that patients needed to have multiple roles and a significant level of involvement in the design, delivery and evaluation of services. These included establishing a participatory research team (in which patients *actively* participate in all stages of the research process), strengthening patient participation in decision-making (by reviving unit-based community meetings with patients and staff) and creating a peer support program for concurrent disorders (including group and one-on-one support from other patients). By directly involving patients in this variety of care processes, the BC patient engagement team was able to support transformative change across the entire hospital, improving the quality of the care that is provided in this unique setting.

4. EVALUATE ACHIEVEMENTS AGAINST OBJECTIVES

Clearly determining and stating goals and objectives helps to ensure the success of patient engagement initiatives. This determination also assists in evaluating outcomes and disseminating best practices so that others can benefit from the initiatives. Effective evaluation—and celebrating the successes that are highlighted through the evaluation process—helps to build sustainability and achieve ongoing engagement.



Strategy in action

Evaluation has played a key role in demonstrating the success of patient engagement at the McGill University Health Centre⁵ (MUHC). Extensive interviews with patients and front-line staff helped to identify areas to focus efforts and measurement was built into every improvement undertaken. As a result, front-line staff and patient representatives understand not only that a particular change is working, but exactly how much of a difference it is making. For instance, nurses are now spending 10% more time at the bedside, while a mental health admission process that used to take more than four hours now takes less than one. Being able to quantify results such as these also helps in building support for the initiative and its extension to other units at MUHC and other institutions in Quebec.

³http://www.iap2.org/associations/4748/files/IAP2%20Spectrum_vertical.pdf

⁴See “Simulating, studying and sustaining patient engagement in a forensic psychiatric hospital” at the BC Forensic Psychiatric Hospital www.cfhi-fcass.ca/WhatWeDo/Collaborations/PatientEngagement.aspx

⁵See “Patients and professionals partner to redesign inpatient care systems: Improving safety, access and work environment” at the McGill University Health Centre www.cfhi-fcass.ca/WhatWeDo/Collaborations/PatientEngagement.aspx

CHALLENGES IN ACHIEVING CLARITY OF PURPOSE

Achieving clarity of purpose is not a simple matter. It involves bringing together different stakeholders, with differing expectations and perspectives, to focus on common goals and objectives. This requires time and resources, both of which can be in short supply in healthcare environments. Not investing in determining goals and objectives at the beginning, however, will lead to problems and wasted resources later.

Another challenge is the discouragement that all stakeholders can feel when their involvement doesn't lead to the anticipated outcomes or impact. This challenge becomes exacerbated when clear objectives are lacking. For example, patient advisory committees in two hospitals became disengaged when their goals and objectives were too vague to permit them to have the impact they would have liked. On the other hand, when a patient advisory committee in another hospital defined its goal as focusing on patient-to-patient support, committee members remained engaged even though the process took nearly six months to bear fruit.

CONCLUSION

As noted in this brief, investing the necessary time and resources in achieving clarity of purpose in patient engagement initiatives at the start has important benefits: it ensures that specific initiatives align with larger organizational objectives and meet patient needs; it permits clear and consistent communication so that all participants understand and are committed to the goals; it helps to determine who needs to participate in an initiative and what they are being asked to do; and it supports evaluation of outcomes against the stated objectives. Having expectations, role and anticipated outcomes clear to all from the start is, therefore, an essential ingredient for healthcare transformation.

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