

# Effective Engagement with Patient Advisors and Advisory Committees





# AGENDA

- **Welcome and Introductions**
- **Format and Zoom use overview**
- **Why should we have patient advisors?**
- **Advisor or Advocate - clarity of role**
- **Principles of Engagement With Advisors**
- **Spectrum of Engagement**
- **Setting up and maintaining advisory structures – tips and tools**

To understand  
the patient  
experience

To realize  
efficiencies in  
care delivery

To improve  
system wide  
care delivery

# Why engage with patient advisors?

To contribute to  
overall better  
population health

To understand  
what is of value  
to patients

To gather input  
to improve  
patient care

To improve the  
outcome of care  
for the patient

To support staff to know  
they are providing care that  
patients need and value

# GOALS

- ~ Provide Person-Centred Care
- ~ Reduce cost of care
- ~ Improve staff well being
- ~ Contribute to better overall population health

*Often referred  
to as the  
Quadruple Aim  
- IHI*

# APPROACH

Partnering with Patient Advisors



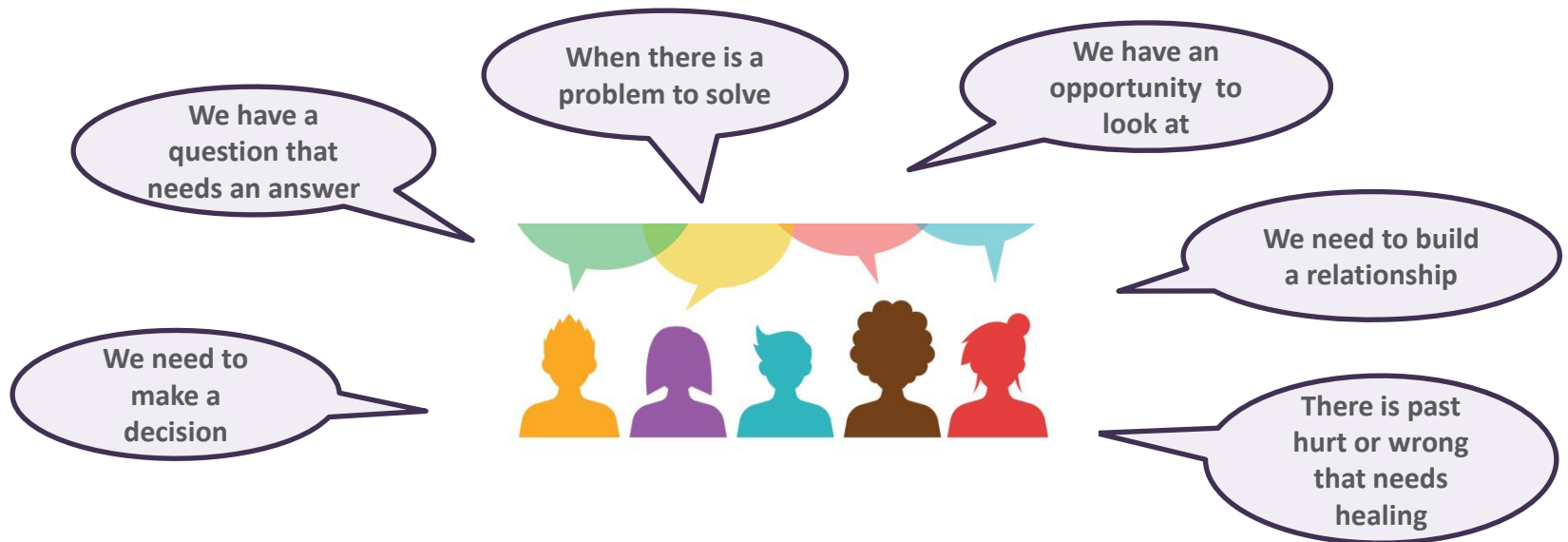
# OUTCOMES

- ~ Improved Patient Experience
- ~ Lower cost of care
- ~ Healthier staff
- ~ Healthier populations

Engaging patients and their families as advisors enables interaction between the health care provider and it's communities, so that people and communities have a role in the planning and decision making for health services that impact their lives.

## *When should we engage?*

*All the time!*



# ACTIVITY

Consider a time when input from a patient advisor affected the way you worked or changed your behaviour or approach to care.

**Share your experience.**

# ***GROUP DISCUSSION***



# Advocate or Advisor?

What is the difference?

Why is it important to clarify the role?

## DISCUSSION





# What is an Advocate?

An Advocate is a person who publicly supports or recommends a particular cause or policy.

What are some other terms to describe an advocate?

First known use as a noun, 14<sup>th</sup> century and as a verb, 16<sup>th</sup> century

# An Advocate

Other ways to describe an advocate...

- champion
- upholder
- supporter
- backer
- proponent
- spokesperson
- campaigner
- crusader
- reformer

# What is an Advisor?

An Advisor is a person who gives advice in a particular field.

What are some other terms to describe an advisor?

First known use, 16<sup>th</sup> century

# An Advisor

Other ways to describe an advisor...

- aide
- helper
- mentor
- coach
- confidant
- guide
- counsellor
- instructor
- enlightener

**Strive to have patient advisors involved in every area of care throughout your organization**

**Advisors bring a perspective and experience that is integral to better decision making**

**Ensure advisors are aware of the impacts of decisions being made**

**Create safe space for advisors to be heard and to be able contribute to decisions**

**Share all the information that advisors need to maximize their contribution**

**Build and maintain relationships with advisors**

# **Principles of Engaging Advisors**

**Consider that communication always moves both ways. If you want advisors to hear you then listen to them.**

**Engage with integrity, in a way that builds trust and credibility with and for advisors**

**Always complete the circle of engagement and let advisors know what you did with their input**

# ACTIVITY

**Q:** Which one of these Principles of resonates most with you? Why?

## DISCUSSION



# Setting up Advisory Structures

Questions to answer:

1. What is the purpose /goal(s) of the project/initiative or the committee?
2. Who is being advised? Who are the decision makers?
3. What is the level of engagement that advisors will be engaged at?
4. What is the composition? How many staff? How many advisors?
5. When will they meet, how often, where or how?
6. How long can the advisor(s) expect to be committed for?

# IAP2 Spectrum of Engagement

Level of Engagement

Increasing level of public influence

## Inform

Community receives information and announcements

## Consult

Community is consulted on draft plans or on issues; feedback impacts decisions

## Involve

System involves stakeholders in planning and policy processes

## Collaborate

Community shares decision-making; system defines limitations

## Empower

Community identifies issues, solutions and actions-system

adapted from the INTERNATIONAL ASSOCIATION OF PUBLIC PARTICIPATION [iap2canada.ca](http://iap2canada.ca)

Time/Commitment/Resources





	<b>INFORM</b>	<b>CONSULT</b>	<b>INVOLVE</b>	<b>COLLABORATE</b>	<b>EMPOWER</b>
<b>Public Participation Goal</b>	To provide balanced and objective information to assist you in understanding the problem, alternatives, opportunities and/or solutions	To obtain your feedback on analysis, alternatives and/or decisions	To work directly you throughout the process to ensure that your concerns and aspirations are consistently understood and considered	To partner with you in each aspect of the decision including the development of alternatives and the identification of the preferred solution	To place final decision making in the hands of the public
<b>Promise to the public</b>	<i>We will keep you informed</i>	<i>We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.</i>	<i>We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision</i>	<i>We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible</i>	<i>We will implement what you decide</i>
<b>Example Techniques</b>	<ul style="list-style-type: none"><li>• Fact sheets</li><li>• Websites</li><li>• Open houses</li></ul>	<ul style="list-style-type: none"><li>• Public comment</li><li>• Focus groups</li><li>• Surveys</li><li>• Public meetings</li></ul>	<ul style="list-style-type: none"><li>• Workshops</li><li>• Deliberative polling</li></ul>	<ul style="list-style-type: none"><li>• Citizen advisory committees</li><li>• Consensus-building</li><li>• Participatory decision-making</li></ul>	<ul style="list-style-type: none"><li>• Citizen juries</li><li>• Ballots</li><li>• Delegated decision</li></ul>

*From the International Association of Public Participation IAP2*

# Setting up Advisory Structures

Once the questions are answered **Terms of Reference** needs to be developed.....

- in collaboration with patient advisors
- at the outset of the project or committee
- and signed off before the project or initiative begins

Terms of Reference act as a guide for staff and patient advisors, setting expectations and mitigating issues.

# Maintaining Advisory Structures

- Terms of Reference act as a guide for staff and patient advisors, setting expectations and mitigating issues.
- ToRs are the basis for strategic planning for advisory committees or project teams.
- Purpose and goals taken from the ToRs can be translated into annual or longer term plans with actions and outcomes attached.
- Strategic planning with advisors offers the opportunity to understand what is important to advisors and if it is in scope for the project or committee.

# Tools for patient advisor engagement

Terms of Reference

Patient Advisor Placement Checklist

Patient Advisor Guidelines for Conduct

Patient Advisor Activity Tracking Tool

Committee/Project Lead Patient Advisor Activity Tracking Tool

Patient Advisor Evaluation

Project Lead Patient Advisor Evaluation

# Tools and Resources for engagement

- **Healthcare Excellence Canada**
  - *Patient Engagement Resource Hub* <https://www.cfhi-fcass.ca/innovations-tools-resources/patient-engagement-resource-hub>
  - *Engagement Guiding Principles* <https://www.cfhi-fcass.ca/innovations-tools-resources/item-detail/2020/05/19/engagement-guiding-principles>
  - *Patient Engagement Resources* <https://www.patientsafetyinstitute.ca/en/toolsResources/Patient-Engagement-Resources/Pages/default.aspx>
- **Vancouver Coastal Health**
  - *Community Engagement Resources* [ce@vch.ca](mailto:ce@vch.ca)
  - *Community Engagement Advisory Network* [Advisors Handbook](#)



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