

How to Find a Patient Partner for Your Project

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~based on Patient Voices Network's (PVN) guidelines

You'll find all the resources referenced below at: <https://patientvoicesbc.ca/>

- A.** On the 1st page of the site, you will see a green tile that says ***"I am a Health Care Partner, I work for a health care organization seeking patient partners"***. Click it
- B.** On the next page, scroll down a bit til you see a red tile that says ***"I want to be a Health Care Partner!"***. Click on this
- C.** This will take you to a page that states ***"Start Here"***. This will walk you through all the steps you need to follow to source a PVN patient partner. As well, all the links you need for the process are on this page. You're now ready to get started!
- D.** And please consider including a patient partner, or more than one, at the inception of your project

Remember, your PQI Coach and NH PQI Patient Partner Advisor can assist you with this process or parts of the process you may not be comfortable with.

Below, we have created a handy list for you to refer to at a glance:

- 1.** Check in with your team and discuss whether everyone is comfortable including patient partners in the group
 - Use PVN's *Health Care Partner Readiness Checklist*
- 2.** To ensure your Team is fully prepared to engage patient partners in your QI project
 - Use PVN's *Engagement Planning Template*
- 3.** To help you clarify your goals in including a patient partner

- Use PVN's *Patient Engagement Planning Canvas*
4. Read and ensure you agree with
 - PVN's *Health Care Partner PVN User Service Agreement*
 5. Fill in the
 - *Engagement Request Form*
 6. Once the *Engagement Request Form* is filled out, send it to PVN. If it meets PVN's criteria, they will post the request on their website and send it out in their virtual weekly newsletter to any PVN patient partners that are signed up to receive it
 7. RSVP's will come directly to your group's designated email inbox
 8. Interview the patient partners that you feel align well with your project (*NH PQI has their own in-depth interview questions available for this process)
 9. PVN suggests that one person from your Team meet *in-person* with the patient partner *before* inviting them to their 1st meeting. This gives you a chance to make sure it's the right fit. It's also good time to chat with them regarding logistics, what their role will be, and how they would like you to close the loop with them once their engagement comes to a close
 - Use PVN's *Closing the Loop Top Ten Tips for Health Care Partners*
 10. Onboard your patient partner by providing a quick orientation module as to what their role will be, time commitments, an overview of the project, and any other applicable points that will help them be fulsome team members. (*NH PQI has created their own in-depth orientation module)
 11. Have your new patient partner member sign a Northern Health *Confidentiality Agreement* if you would like to augment PVN's requirement of their patient partners to sign the *Patient Partner Service User Agreement*, which includes a confidentiality clause
 12. Appoint one of your Team members to liaise with the patient partner. The liaison can answer any questions they make have regarding logistics, IT issues, or scope of the project. They should also check in regularly with the patient partner to ensure that there are no barriers keeping them from participating fully
 13. Now—include your patient partner in your project meetings

14. Once the project comes to its conclusion, close the loop with the patient partner

- Fill out PVN's *Closing the Loop Template* and send this to the patient partner
- There is a *Closing the Loop* example to help guide you
- Use PVN's *Closing the Loop Top Ten Tips for Health Care Partners*

15. If you would like to keep a record of your patient partner's contributions to the group, PVN has a handy form on their site called

- *Closing the Loop Engagement Notes*

16. Continue to share updates with the patient partner if you feel their contributions had a positive impact on the longterm success of the project

PVN has other key resources to help you, the Health Care Partner, such as:

- *The Guide to Authentic Patient Engagement*
- There's also a **quick** video series on the subject
- The *IAP2 Spectrum of Public Participation* diagram
- The *Patient Partner Appreciation & Recognition Guide*
- *Diversity, Equity & Inclusion: Elevating the Voices of all in BC*
- *Culturally Safe Engagement: What Matters to Indigenous (First Nations, Metis & Inuit) Patient Partners Pamphlet*

Conflict Resolution:

If any issues or conflicts *should* arise with the patient partner that you've included in your group, and you don't feel that it's a low-level issue that can be easily resolved in a conversation between you and the patient partner in question—reach out to PVN. They have a clearly defined management process in place for this.

In fact, when a volunteer signs up with PVN to become a patient partner, they are required to agree to, and sign the *Patient Partner Service User Agreement*. Immediately below it, on the same page, the conflict resolution process information is available.

Here's what will happen when you reach out to PVN to resolve an issue with a patient partner:

- If the issue is minor, and both parties agree they are still comfortable working together after resolving the issue, the patient partner will continue on as part of the team
- If the issue is unresolvable or of a serious enough nature, the patient partner will be removed from your group, and possibly—from PVN