

Yellow Kayak

By Kim Eggers

Today, I want to share with you, the health care professional, why it's key to include patient partners in your projects and initiatives.

There are probably a thousand reasons to include a patient partner as part of your QI projects, and I'm betting you've heard a lot of them already. I don't think any one of them trump the others.

For me, I think the primary reason to include patient partners in health care improvements is that until you live through something yourself—*it just doesn't truly resonate for you.*

I'll share with you an example of this from my own life. I had wanted to take up kayaking for years, but never quite got to it. Finally, a friend that had 25 years experience kayaking, offered to lend me a kayak and the required gear, then took me out on a local lake. As soon as I got in that borrowed kayak and paddled around for a few minutes—I was in love with kayaking!

But until that “**moment of experience**” and the following couple of hours on the lake—I only had a **theory** in my head of what kayaking would be like.

I think the same is often true of health care professionals; the majority are trying to deliver the best health care possible, based on high quality data and best care clinical standards. They strive to improve things for their patients. But a patient that lives *through* that care will always have that “**visceral experience of care**” which imparts to them insights into how a protocol or care plan can be changed or improved (*if need be).

I'll share with you another example—but this one is related to a health care experience of mine. I had to go to the ER a while back. A very personable, professional nurse had to get an IV into me. As she was going about it, she encountered some type of problem & told me she would have to try it on my other arm. Since I always like to be informed

about my care, I politely asked her why. She told me that she had “blown the vein” on my initial arm. Honestly, that freaked me out a bit, not having any idea what that meant—so I asked her. She politely side-stepped the question. Being too polite to push harder for the information, I ended up laying there, worried one of my veins was destroyed. This *really* added to the stress of being overnight in the ED. To alleviate my concern, I asked a nursing student what it meant. Once I *had* the information, I was fine with what happened in the ED that night.

This is the type of straightforward thing that a patient such as myself can share with a health care group that might be seeking to improve the communication pathway in the ED. As a health care professional, the nurse that I dealt with was doing the best she could—that was obvious. But one, quick, honest conversation with a patient or patient partner, such as myself—could have improved that issue very quickly—without forming a long term committee and all *that* demands.

I’m going to be frank with you: this is just one example of many things that I’ve experienced, wherein I inadvertently ended up highlighting a gap—albeit a small gap in this case—in various health care pathways in my health authority. But even though I’ve had much more traumatic experiences of health care besides the example I just shared with you—I decided to *partner* with health care groups to improve things. In fact, years ago, after calmly sharing a particularly traumatic health care experience of mine with an executive-level NH staff member—*she* advised me that I should start a complaint process regarding the incident.

Instead, I chose to work *with* the health authority, believing that **working together** on something in a constructive manner, may well improve things *if* everyone truly commits and throws in on it. I’ve dedicated thousands of hours in the past 9 years, and I know of many other Patient Voices Network (PVN) patient partners that have done the same, in our pursuit to co-create better health care.

So, I encourage you to include us, the patients, and the patient partners, since it’s a great way—a **shortcut really**, to addressing gaps in health care. Ones that can be difficult to see, or even notice—if they’re minor enough. And the truth is, when health care groups **truly partner** with us—we are much more able to **truly contribute** to the group’s success.

Groups such as the BC Emergency Medicine Network (BCEMN), BCIT’s SoHS programs, and NH PQI, all worked/work shoulder-to-shoulder with me, as a true partner does. And because of this, I was (and am) able to tap into my strengths & skillsets at a much deeper level and make important contributions.

And in between all the time I spend working with authentic partners in health care—you’ll probably find me in my yellow kayak (weather and season-permitting!).

So, let's get to the "HOW" of finding a PP for your next (or current) project or initiative.

Fortunately, what used to be a convoluted, time-consuming process—has now become streamlined and user-friendly, with the understanding that health care professionals and staff are so busy as it is—that they need an easy-to-use process *if* PP's are to be included. I'm going to quickly walk you through PVN's process. You can access this info at 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**. *This can make a big difference in the quality of the partnership between PP's and h.c. groups!

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 group
 - 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. Then you'll have to read & ensure that you agree with
 - The *Health Care Partner PVN User Service Agreement*

5. Now, you will be at the point when you will be filling out the
 - *Engagement Request Form* (*there is an example of how to do that)
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 (*which most of us are—since this is how we find out what engagements are available!)
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
9. Once you have chosen your PP, PVN suggests that one person from your Team meets *in-person* with the patient partner *before* inviting them to their 1st meeting. This gives you a chance to make sure it's a good fit
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
11. If you have any concerns regarding confidentiality, be aware that all PP's must sign a confidentiality agreement in order to become **PVN** PP. But go ahead & have them sign a Northern Health *Confidentiality Agreement* if you like
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. The liaison should also check in regularly with the patient partner to ensure that there are no barriers keeping them from fully participating
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. PVN has a *Closing the Loop Template*, a *Closing the Loop example* & a checklist called *Closing the Loop Top Ten Tips for Health Care Partners* to aid you in this process

15. If you would like to keep a record of your patient partner's contributions to the group, since this can help the group make decisions about the best way to include PP's in the future—PVN has a handy form on their site called

- *Closing the Loop Engagement Notes* for this

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

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
 - There's also a **quick** video series on the subject on the PVN site, that I would recommend that gives a quick overview on the subject
 - **& another great resource that I would highly recommend that you check out, is the SSC's Meaningful Patient Partner Engagement: A Guide for Projects and Committees** resource for finding PP's. Their sections on **onboarding & supporting-the-PP** are great. You'll find it at sscabc.ca