

# The Road to Patient Engagement Learning Collaborative



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Live  
Transcript



Chat



Raise Hand



Recording



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# Learning Objectives

- Recognition of the essential elements for patient engagement.
- Know the importance of patient engagement for the prevention and treatment of disease in the patient population.
- Understand how organizations can work with patients to obtain input and feedback about improving patient experiences.
- Learn strategies and existing resources to support patient engagement, particularly for historically underrepresented populations.



# Migrant Clinicians Network

The Migrant Clinicians Network (MCN) is a nonprofit that provides support, technical assistance, and professional development to clinicians in community health centers, health departments, and other health care delivery sites.



# National Nurse-Led Care Consortium



The **National Nurse-Led Care Consortium (NNCC)** is a membership organization that supports nurse-led care and nurses at the front lines of care.

NNCC provides expertise to support comprehensive, community-based primary care.

- Policy research and advocacy
- Technical assistance and support
- Direct, nurse-led healthcare services



# Infrastructure for Patient and Community Engagement

## Patient and Community Engagement Learning Collaborative

Pam Dardess, MPH

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# Objectives

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- Develop a shared understanding of patient and community engagement
- Discuss the purpose of engaging patients, families, and community members in health and healthcare
- Learn about strategies for building your patient and community engagement infrastructure





# Engaging in the learning collaborative

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- Today
  - Use the chat to share experiences, suggestions
  - Ask questions via chat
  - Participate in Mentimeter activities
- Throughout
  - Use this time to identify opportunities, ideas, questions
  - Think about how to translate ideas into action





# How would you describe or define patient and community engagement?





# Defining patient and community engagement

Patients, families / care partners, and health care professionals working together, at various levels, in active partnership to improve health and health care



Carman, K., Dardess, P., et al., "Patient and Family Engagement: A Framework for Understanding the Elements and Developing Interventions and Policies" *Health Affairs*, 32., no.2 (2013): 223-231.





# Who has a role?

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Patients, families / care partners, and health care professionals working together, at various levels, in active partnership to improve health and health care

- Patients
  - Exist beyond the health care system walls
- Family and care partners
  - Provide assistance to and serve as supports for patients
- Health care professionals and staff
  - Physicians, PAs, NPs, nurses, nursing assistants; pharmacists; allied health professionals; public health; community health workers





# Defining patient and community engagement

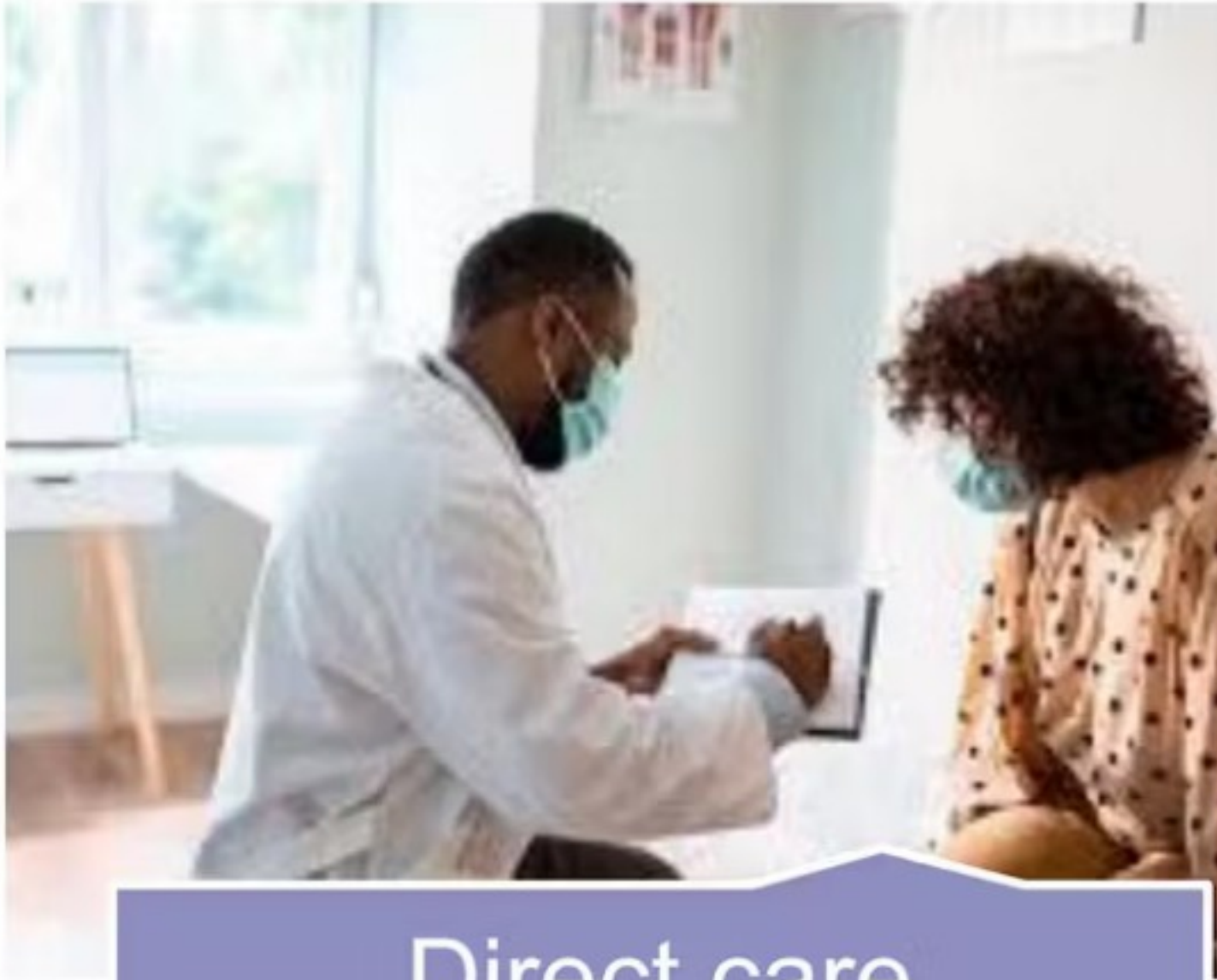
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Patients, families / care partners, and health care professionals working together, at various levels, in active partnership to improve health and health care





# Levels at which patients / communities are engaged



Direct care  
(point of care)



Organizational design  
and governance



Policymaking





# Engagement at the direct care level



Direct care  
(point of care)

- Patients and their care partners:
  - Know how to access and navigate the health care system
  - Understand their role in providing information and asking questions
  - Participate to the extent desired in developing a health care plan, including appointments and care needed
- So that:
  - Patients feel confident in their ability to manage their health and health care
  - Health care providers understand and address patient priorities, needs, and potential barriers to care follow-through





# Engagement at the direct care level

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1. Help patients and care partners prepare for appointments
  - Visit planning instructions, what to expect
  - Pre-appointment questionnaire to identify concerns and questions
2. Share, discuss information in ways patients can understand
  - Plain language
  - Culturally appropriate patient education materials
  - Ask-Tell-Ask, Teach Back
3. Develop processes and materials to facilitate shared decision making
  - Culturally appropriate decision aids
  - Alignment of care plan with patient priorities and reality of their life
4. Provide support outside of the health care interaction
  - Clear, simple after visit instructions
  - Self care support
  - Peer support and coaching





# Engagement at the direct care level: Example 1

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- Diabetes Management – Intermountain Health Care
  - Focused on clinics in Utah to achieve goal of getting 50% of patients in the prediabetes registry into diabetes prevention program
  - Program includes:
    - Prediabetes 101 class, 2-hr group session offered virtually. Friends, family attend at no extra charge. Attendees more likely to achieve 5% weight loss, lower incidence of developing T2 diabetes after 1-2 years.
    - Community-wide screening events
    - Scholarships to people in underserved communities





# Engagement at direct care level – Example 2

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- Shared decision making for high BP at FQHCs
  - Physician training for patient activation/engagement/SDM; group visits for patients to receive similar training
  - Physician and patient review info, decision support tools together, set goals, discuss purpose & side effects of meds
  - Follow-up visits at 3, 6 months to negotiate agreements on medication use, lifestyle changes
  - Results showed better BP control than among patients at control sites





# Engagement at the direct care level: Example 3

- **Durham Vaccine Equity Initiative**

- Partnership between 9 community-based organizations
- Deployed bilingual CHWs into the community to provide education about vaccines, address registration barriers (e.g., technology access, fear of legal repercussions), provide support and follow-up
- At conclusion, disparity between White and Black vaccination rates decreased by 19 percentage points. Disparities between Hispanic and non-Hispanic adults were eliminated.





# Engagement at the organizational and policy levels



Organizational design and governance, policymaking

- Patients and community members:
  - Share their perspectives, experiences, and needs with health care organizations
- So that:
  - Health care providers and organizations better understand and respond to patient and community concerns, priorities, and barriers to care
  - Patients and communities benefit from programs, practices, policies that address their needs
  - Health care resources are used in ways that matter to and make a difference for patients and families





# Engagement at organizational and policy levels

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1. Listening sessions to understand community priorities
  - Virtual or in-person; reflect diversity of patient population served
  - Obtain input about priorities, positive experiences, opportunities to improve, issues related to equity and inclusion
2. Patient and community participation on task forces, workgroups
  - Individuals who have offered helpful input or comments and who seem invested in the clinic/practice
  - Participate on workgroups, committees, in short-term or ad hoc projects
3. Patient and community advisory councils, boards
  - Formal group of patient and community advisors who meet regularly, work with staff to identify priorities; provide input and feedback on practices, processes, policies; contribute to practice improvement initiatives; enhance patient and family communication; help plan improvements to facility space





# Engagement at the organizational level: Example 1

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- Pediatric hospital in NYC
  - Spanish-speaking advisory council members shared challenges of not being able to communicate with their child's care team
  - Hospital is working with patient and family advisors to develop training materials for clinicians, help them develop skills in navigating these situations
  - Spanish-speaking advisors are helping develop a case scenario with a mom who speaks only Spanish and her eight-year old daughter, who is bilingual





# Engagement at the organizational level: Example 2

- OHSU Family Medicine at Richmond (FQHC, Portland, OR)
  - Patient Advisory Council (PAC) meets every 2 months to discuss a variety of topics, work on specific projects
  - Social determinants of health screener – PAC helped in discussions of workflow, impact on medical assistants, acceptability to patients. Also contributed to document edits, review of design.

The screenshot shows a survey titled "Patient Support Survey" with the OHSU logo. It includes a "Patient label" box. The survey text states: "There are many things that may affect your health. The more we know about you, the better care we can provide. We cannot help with every need, but we can connect you with someone that can help." It asks "How can we contact you?" with options: "I would like to talk to someone about this today", "Phone" (with a dropdown for "Call or Text"), "MyChart", and "Do not contact me about this form". It then asks "What concerns do you have?" and lists 20 categories in a two-column grid, each with a checkbox and an icon: Utilities, Food, Housing needs, Transportation, Language, Clothing, Medicine, Education, Kids and babies, Social connection, Mental health, Vision (eye) care, Dental (tooth) care, Hearing, Drugs and alcohol, Health insurance, Employment / disability, Legal, Physical activity, Money, and Relationship safety. There is also an "Other:" field and a "I prefer not to do this survey today." option at the bottom.

**Patient Support Survey**

There are many things that may affect your health. The more we know about you, the better care we can provide.

We cannot help with every need, but we can connect you with someone that can help.

How can we contact you?

☐ I would like to talk to someone about this today

☐ Phone \_\_\_\_\_ (☐ Call or ☐ Text) ☐ MyChart

☐ Do not contact me about this form

What concerns do you have?

<input type="checkbox"/> Utilities	<input type="checkbox"/> Mental health
<input type="checkbox"/> Food	<input type="checkbox"/> Vision (eye) care
<input type="checkbox"/> Housing needs	<input type="checkbox"/> Dental (tooth) care
<input type="checkbox"/> Transportation	<input type="checkbox"/> Hearing
<input type="checkbox"/> Language	<input type="checkbox"/> Drugs and alcohol
<input type="checkbox"/> Clothing	<input type="checkbox"/> Health insurance
<input type="checkbox"/> Medicine	<input type="checkbox"/> Employment / disability
<input type="checkbox"/> Education	<input type="checkbox"/> Legal
<input type="checkbox"/> Kids and babies	<input type="checkbox"/> Physical activity
<input type="checkbox"/> Social connection	<input type="checkbox"/> Money
<input type="checkbox"/> Other: _____	<input type="checkbox"/> Relationship safety

☐ I prefer not to do this survey today.





# Engagement at the organizational level: Example 3

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- UCHHealth Family Medicine Center (FMC) Food Pantry
  - Patient and family advisory council wanted to respond to increase in demand for food pantry (50% increase in number of families served in first 3 months of 2023)
  - PFAC developed the “Grow a Row” program, led by an advisor who has experienced food security
  - Seeds are distributed to community members who would like to help grow food for the community; when crops are ready, they will be dropped off back at the food pantry





# Defining patient and family engagement

Patients, families / care partners, and health care professionals working together, at various levels, in active partnership to improve health and health care





# Continuum of patient engagement

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Patient and family engagement means doing WITH patients and families, not TO or FOR them





# Direct care level: Partnership and shared leadership?

Strongly disagree

A patient receives a written after-visit plan developed for her, with instructions about lifestyle changes to manage high BP

3.2

Community health workers discuss care plans with and provide self-management support to patients with diabetes

4.5

Physicians and medical assistants review patient files in advance of appointments to identify key concerns and topics to discuss

3.6

Strongly agree





# Organization/policy level: Partnership and shared leadership?

Strongly disagree

Several patients and community members are appointed as original members to a workgroup on vaccine education

4

Patients and families are invited to comment on final plans for redesigning a community clinic's waiting area

3.4

Based on a review of patient surveys, clinic staff make changes to the check-in process

4

Strongly agree

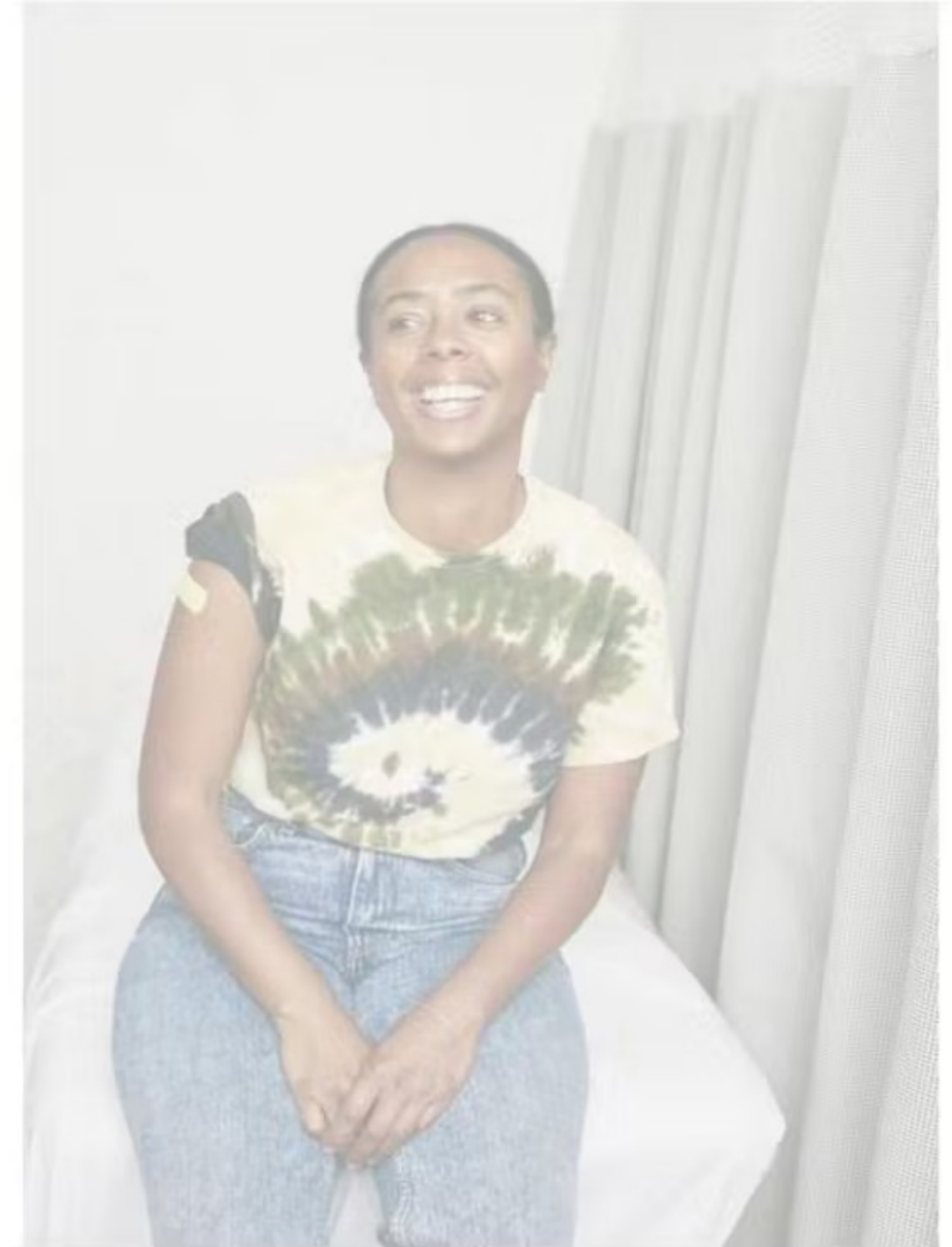




# Defining patient and family engagement

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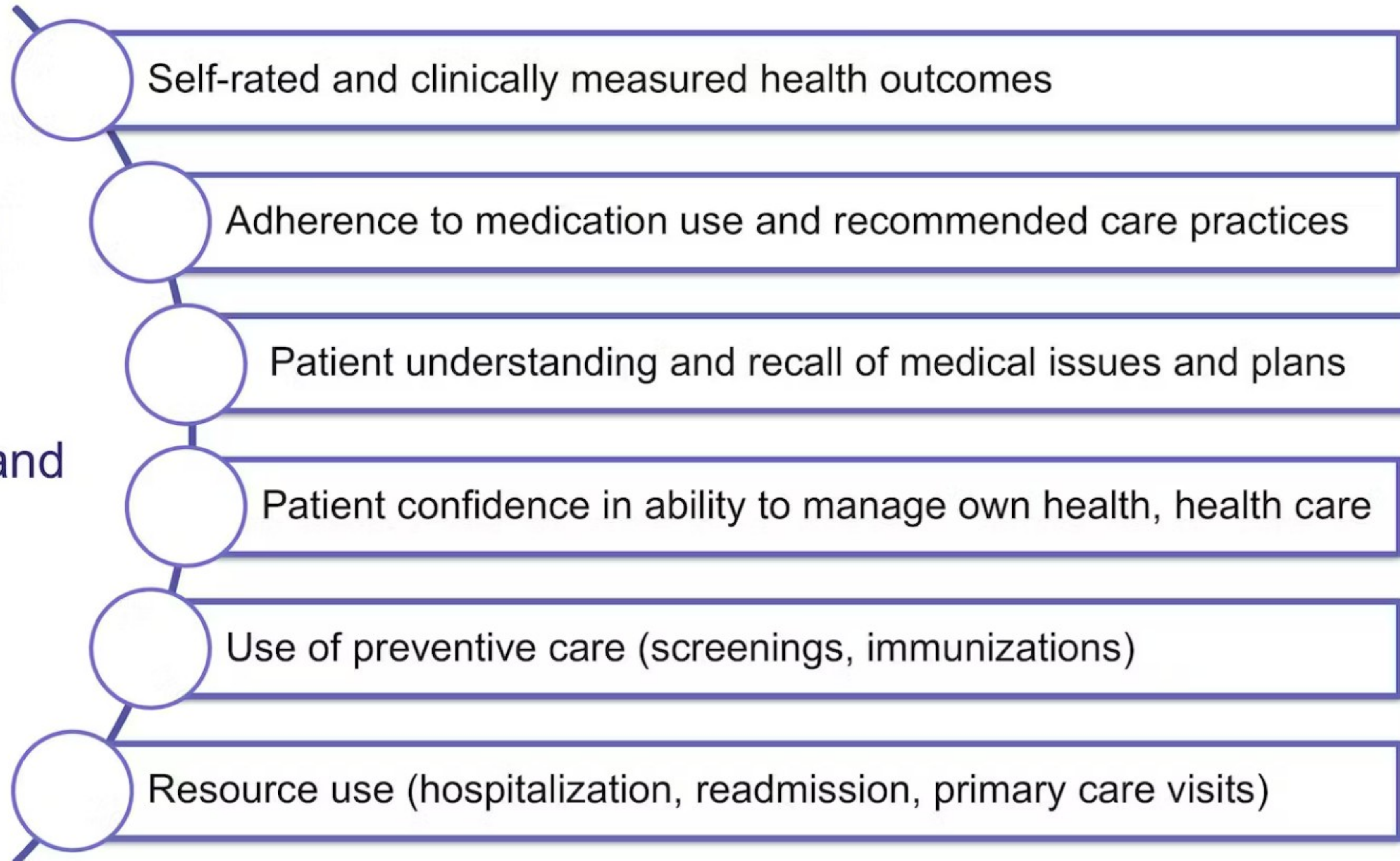
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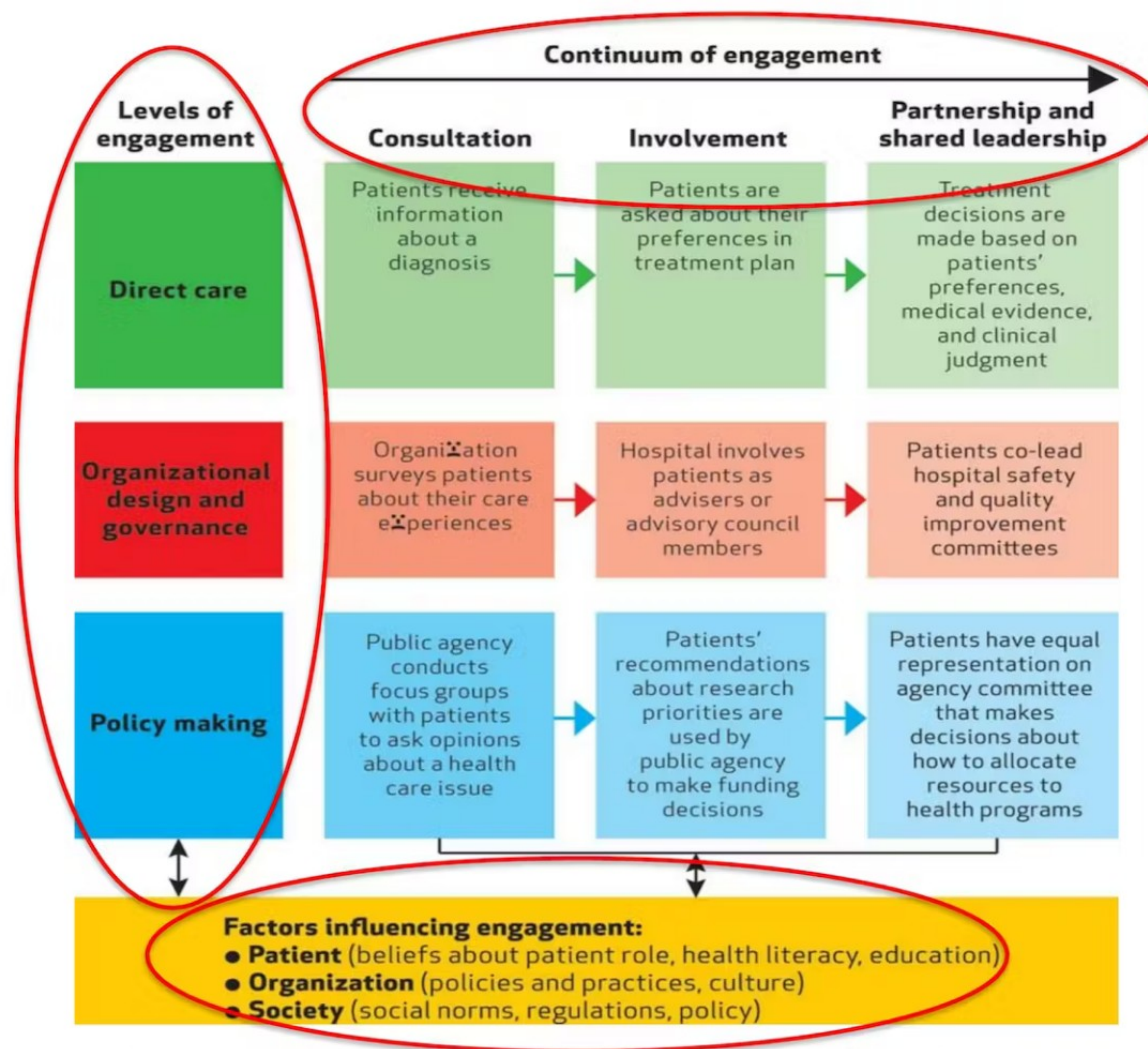


# Studied benefits of patient and family engagement

Research has demonstrated correlation between engagement and outcomes in terms of:







1. Levels of engagement
2. Continuum of engagement
3. Factors influencing engagement



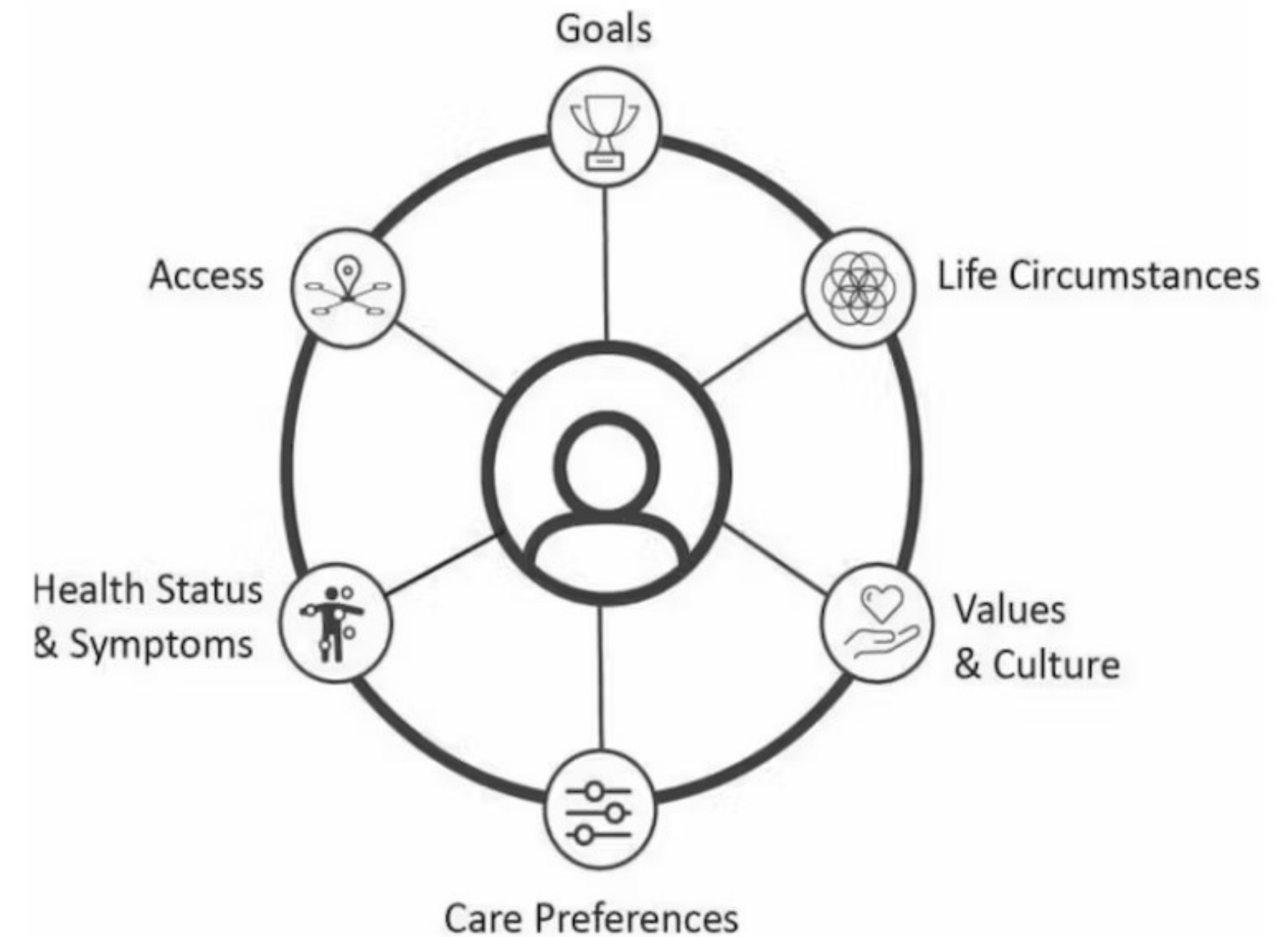
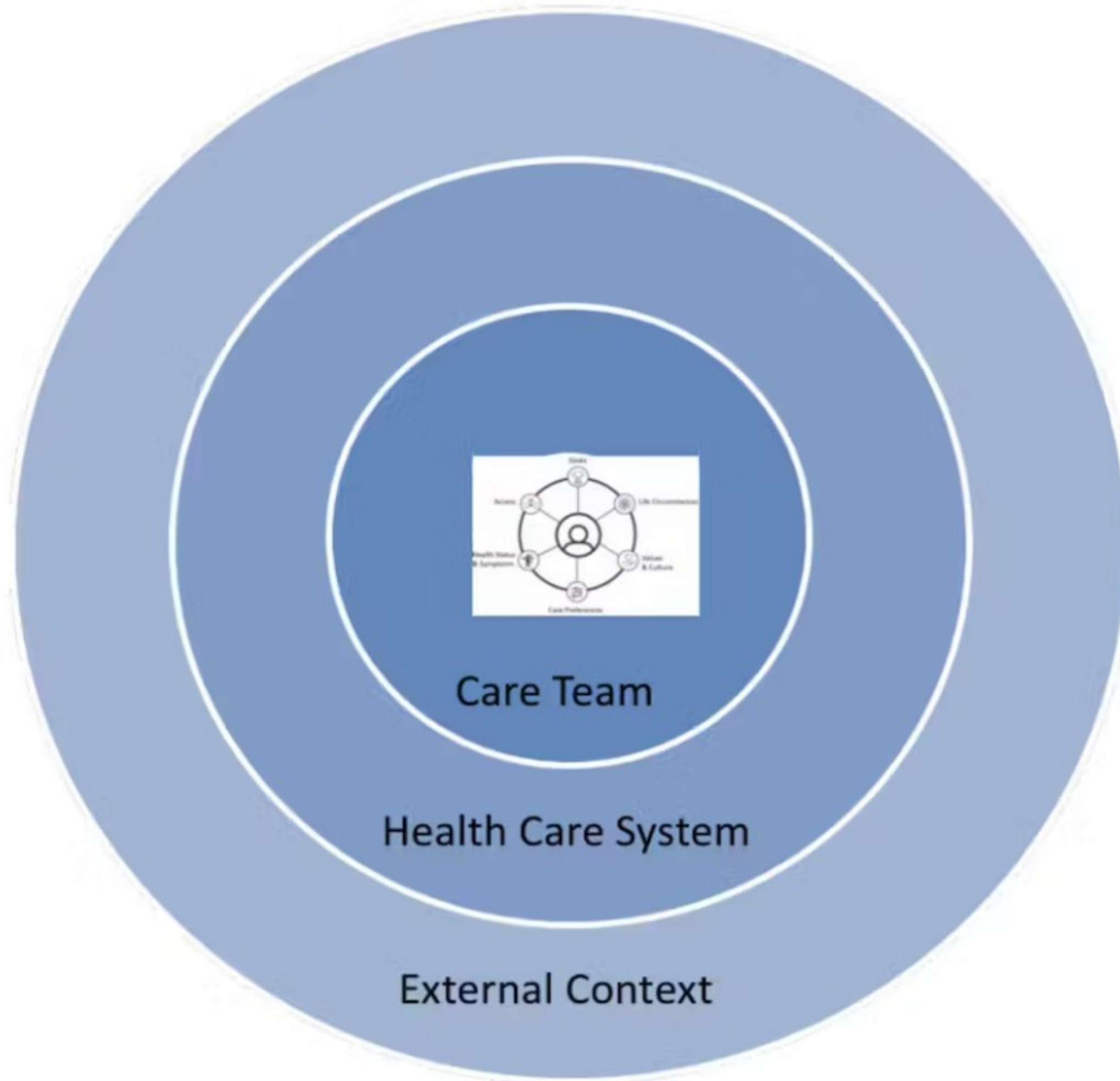


# What are some barriers to patient, family, and community engagement?





# Patient engagement occurs in context





*“As an advocate, I’m often asked ‘How do we get people to engage more in our health care system?’ or ‘How do we get patients to...’ fill in the blank.*

*I think we need to turn that question on its head. We should be asking patients, ‘How can we build a system that better meets your needs — one in which you want to engage?’”*

**Debra Ness**

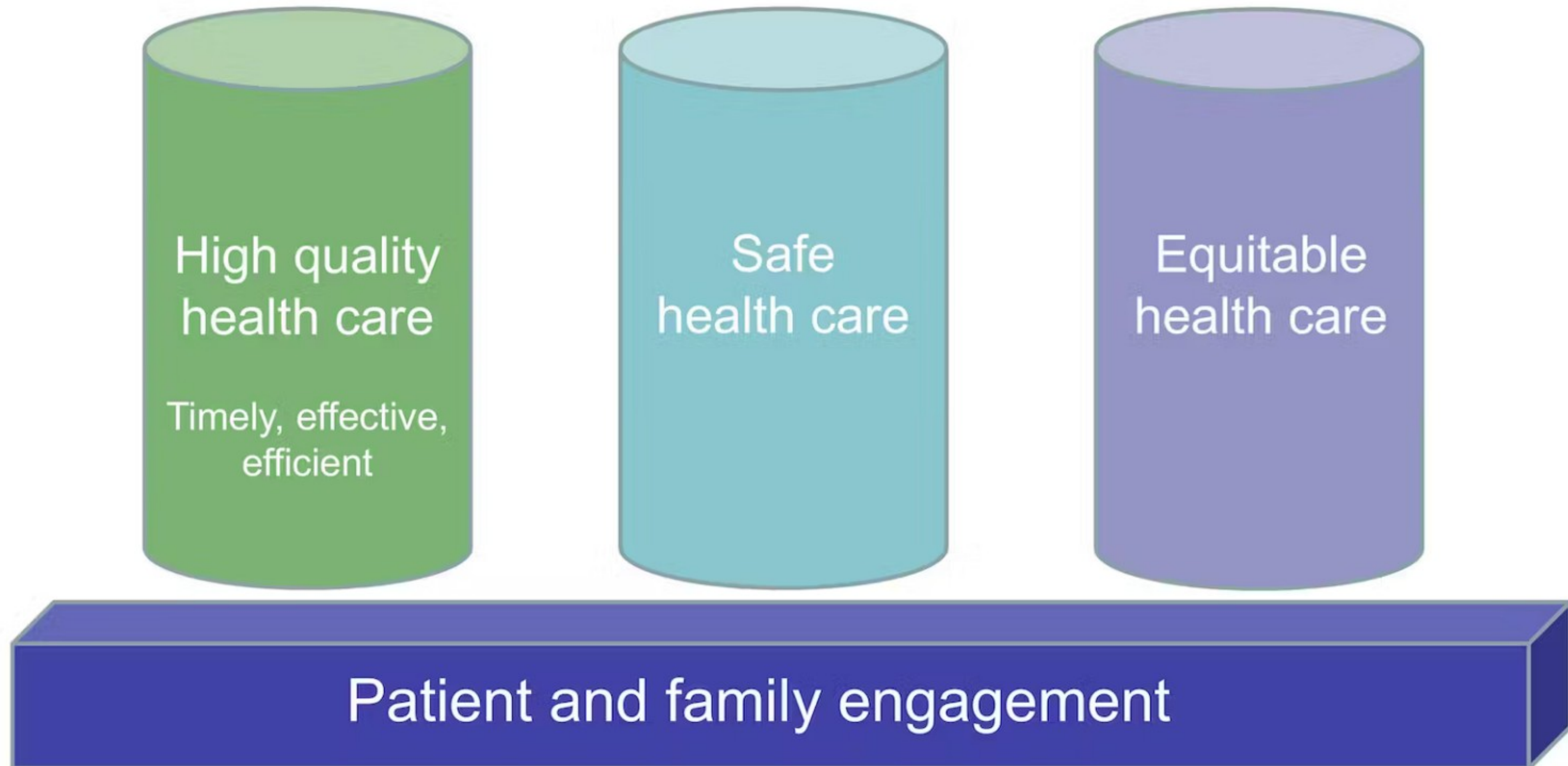
Former President, National Partnership for Women and Families





# Building the infrastructure for engagement

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# Elements of engagement infrastructure



## Organizational culture

- Vision, mission, values statement
- Written policies
- Leadership support
- Clinical and other champion(s)
- Orientation and education
- Position descriptions
- Performance appraisals



## Direct care level practices

- Information sharing
- Goal setting, shared decision making
- Care and referral follow up
- Peer navigators, liaisons



## Organizational level practices

- Patient and family advisory councils
- Patients and families on workgroups or committees
- Patient Board members play role in health center operations





# Questions for thought - others

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- How does patient and community engagement relate to the work we do?
- What role can our organization play in supporting and promoting patient and community engagement?
- What specific actions can we take?
- Who can we partner with, or who would benefit from our partnership?





Q+A



The Road to Patient Engagement  
(session 1)



# Evaluation Survey



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# Future Events

## Module 2: Engaging Patients in Direct Care

Thursday, May 11th, 2023, from 9:00-10:00 am PST/1:00 - 2:00 pm EST

## Module 3: Developing Patient Leaders

Thursday, May 18th, 2023, from 9:00-10:00 am PST/1:00 - 2:00 pm EST

## Module 4: Process Development for Patient Engagement

Thursday, May 25th, 2023, from 9:00-10:00 am PST/1:00 - 2:00 pm EST



Visit us on the [Health Center Resource Clearinghouse](#) to view all of our T/TA materials and future events!



[MCN](#)



[NNCC](#)



**Streamline**, MCN's quarterly clinical publication providing information and resources to frontline clinicians working with mobile underserved populations.: Issues going back to 2001 available for you to download free of charge. (2022). **Resource Type:** Publication. **Description:** Streamline is MCN's quarterly clinical publication. [More Details...](#)



**Farmworkers and COVID-19: FAQ** (2022). **Resource Type:** Other. **Description:** This MCN blog post serves to provide answers to many of the frequently asked questions we have received concerning Farmworker Health and COVID-19. [More Details...](#)



**Partnership for the Future: Health Centers and Maternal Child Health Home Visiting Opportunities** (2022). **Resource Type:** Publication. **Description:** The National Nurse-Led Care Consortium (NNCC) has developed a publication on Maternal, Infant, and Early Childhood Home Visiting (MIECHV) funded home visiting programs working in partnership with health centers. The publication outlines key steps and resources for integrating MIECHV programs and health centers and provides examples of successful collaborations. [More Details...](#)



**All Hazards Emergency Preparedness and Response Competencies for Health Center Staff** (2022). **Resource Type:** Publication. **Description:** The National Nurse-Led Care Consortium (NNCC) and the Community Health Care Association of New York State (CHCANYS) have developed a set of competencies to improve the emergency and disaster preparedness of all health center staff. This publication provides a comprehensive overview of these competencies and sub-





# Thank You

If you have any further questions or concerns,  
please reach out to NNCC's Program Manager,  
Fatima Smith at [fasmith@phmc.org](mailto:fasmith@phmc.org)