

# Creating Engagement Capable Environments in Ontario Health Teams: A Framework for Action

Public and Patient Engagement Collaborative (PPEC)  
with members of the Engagement Capable OHTs Working Group

September 27, 2023



# Patient, family and caregiver (PFC) partnership and engagement in OHTs

- Patient partnership and community engagement - key OHT element (Building Block #3)
  - additional focus on PFC partners at governance table in Path Forward
- Limited expertise and capacity to lead and support PFC engagement and partnering across OHTs
- Considerable burden being placed on PFC partners to lead and support this work



**\*\*Identified need:** support OHTs to demonstrate the centrality of PFC partnership and engagement to their mission and put key capabilities in place to effectively support PFC engagement and partnership as they develop and mature

# Scope of Our Work

Develop a capability framework, including core competencies, supports and enablers, for patient, family and caregiver (PFC) engagement and partnering in OHTs, linked to a maturity model and relevant resources

## Key Questions

- **What key competencies (skills, knowledge, attitudes, behaviors) and supports and enablers are needed for PFC partnership and engagement at different stages of OHT development and for different groups (OHT staff/leadership, PFC partners)?**
- **What are the training and related resources available to build and develop these competencies, supports and enablers? (Where are the gaps?)**



# Working Group Members

## **Co-Chairs:**

Julia Abelson, PPEC

Betty-Lou Kristy, Chair, Minister's PFAC

## **OHT Representatives:**

Lindsay Wingham-Smith, Mississauga OHT

Laura Tenhagen, Algoma OHT

Aleksandra Milosevic, Ottawa OHT

Lotje Hives, Nipissing Wellness OHT

Reham Abdelhalim, Burlington OHT

Vyshnave Jeyabalan, North Toronto OHT

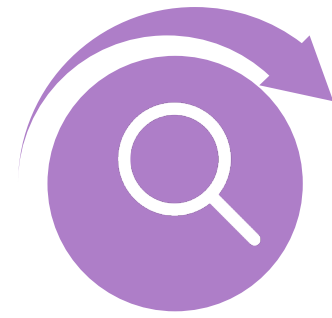
## **Non-OHT Representatives:**

Maureen Smith, Patient Partner

Michelle MacKinnon & Jessica Riehm,

Ministry of Health

# Our Collaborative Approach



**Review evidence** to identify existing, relevant frameworks



**Survey OHTs to brainstorm individual skill, knowledge, attitude and behavioural competencies + key organizational structures and enablers**



**Review input and generate draft** competency and enabler domains



**Consult** with additional groups to bring an equity/priority populations focus

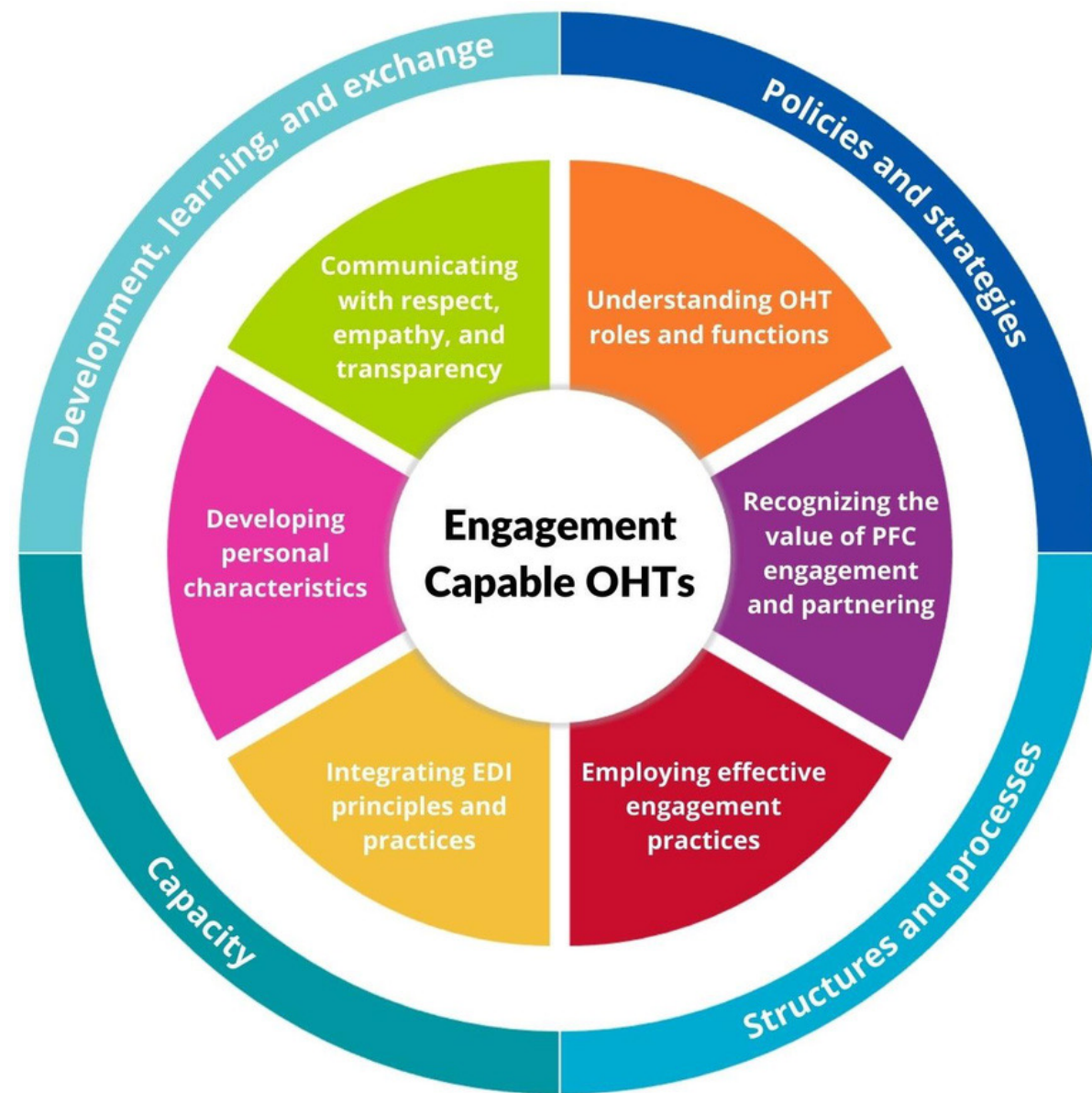


**Further refine** the framework + consider maturity stages

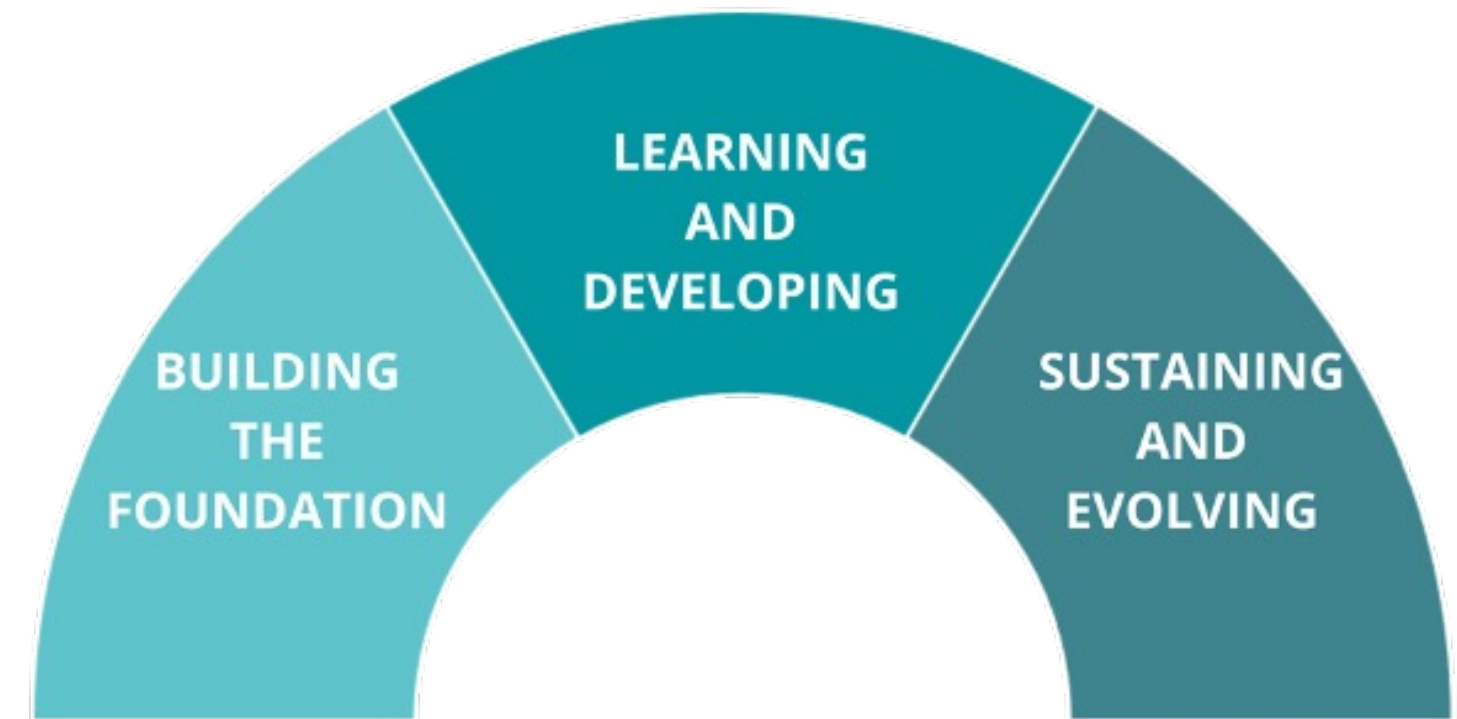


**Identify resources and supports** for each framework element

# Framework Overview



**Competencies, supports and enablers**  
+ links to **resources** for each element



**Maturity stage guidance**

# Element 1: Competency & Enabler Framework for Engagement Capable OHTs

## Competencies, supports and enablers

There are 6 competency and 4 support and enabler domains that comprise the engagement capable OHT framework (presented here and in the following sections). Competencies are the essential knowledge, skills, attitudes and beliefs that are necessary to be successful within a certain field, in this case, for patient, family and caregiver engagement and partnering. Supports and enablers provide the infrastructure that fosters the competency development required to build and sustain engagement capable OHTs.

For each of the competencies, supports and enablers, we have included key resources. Lack of experience or knowledge in any of these competency areas should not exclude individuals from partnering with OHTs or serve as barriers to participation.

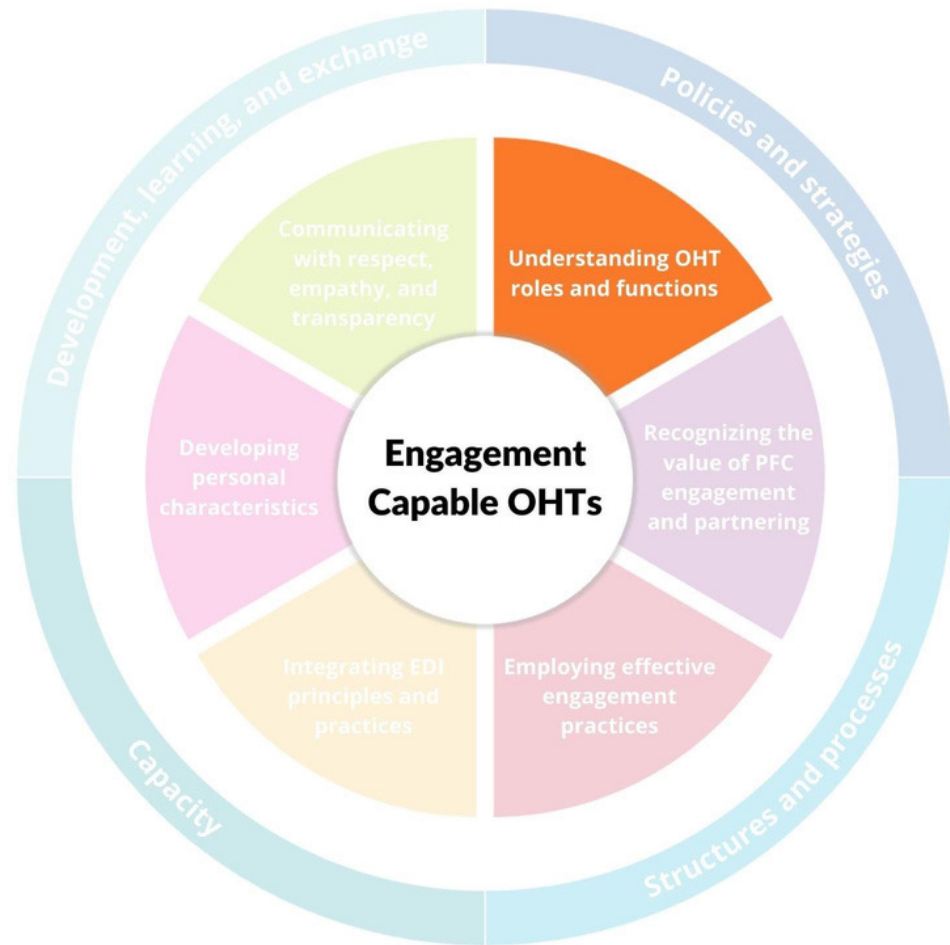


## Understanding OHT roles and functions in relation to health and social service systems

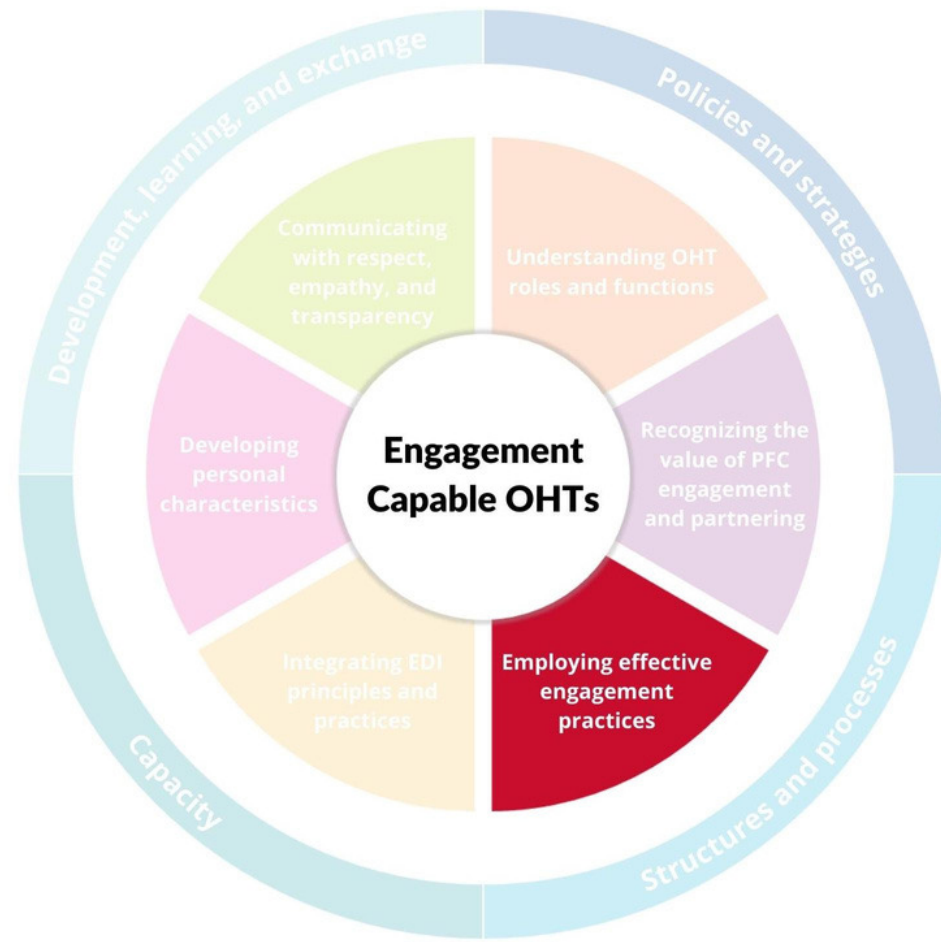
- Understand **what an OHT is**, including structure, function and purpose
- Understand the **OHT community**, including the attributed population, challenges faced and supports needed
- Understand the **basic structure and funding arrangements of OHTs** and provincial health care
- Understand the **process of system transformation**

## Recognize the value of PFC engagement and partnering

- Understand the **centrality of PFC partners' perspectives** to patient-centred health and social care systems
- Demonstrate **commitment to and passion for PFC engagement**
- Understand **what PFC partners bring to their roles** (experiences with and beyond the health system)
- Demonstrate **openness and sensitivity** to PFC experiences, stories and perspectives
- **Appreciate, recognize and celebrate** PFC partners' contributions and successes

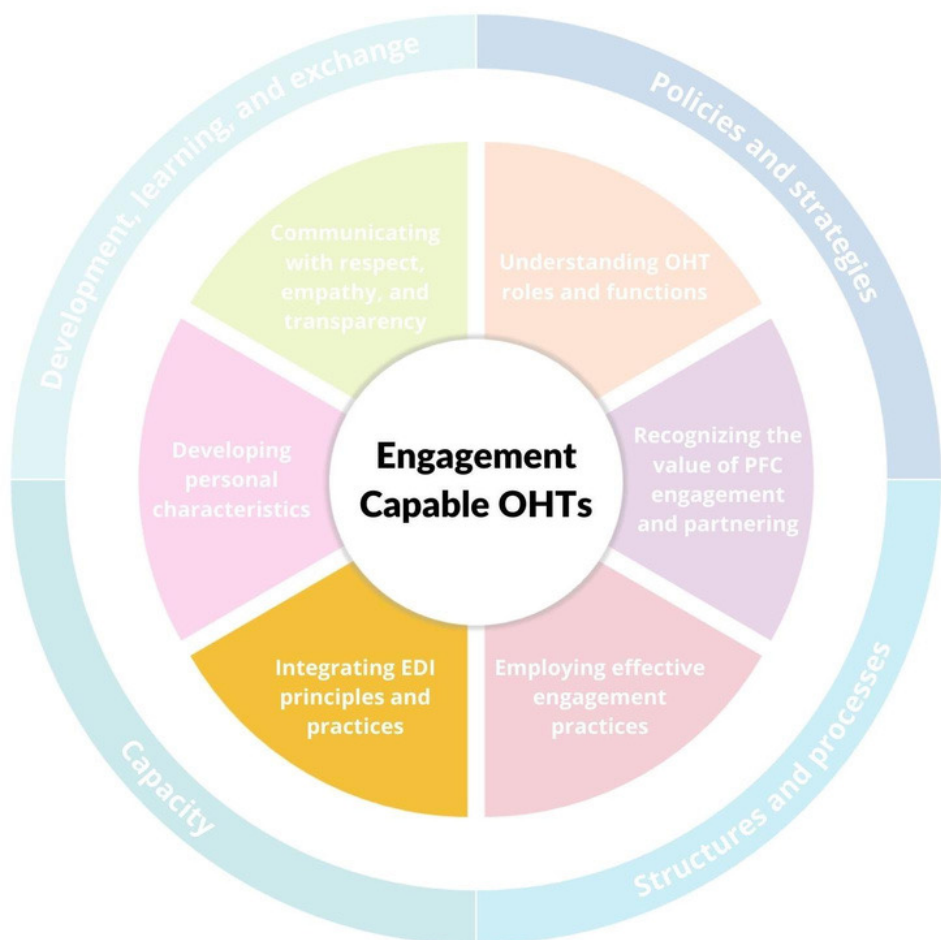






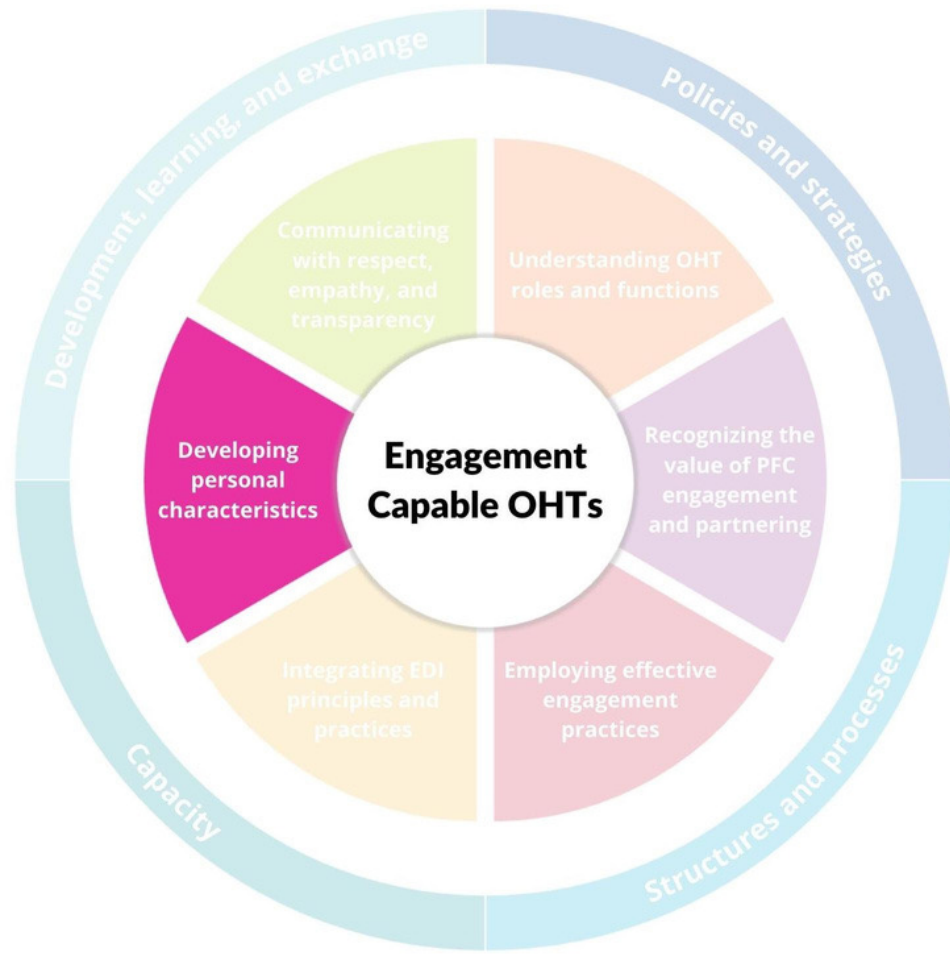
## Employing effective patient, family and caregiver (PFC) partnership and engagement practices

- Understand the **meaning of partnership and engagement** in the OHT context and the different forms it can take
- Understand the **principles and approaches** required to foster safe and respectful engagement and partnering
- Understand the **core requirements for effective partnership and engagement**
- Understand the **role of evaluation** to supporting learning and improvement



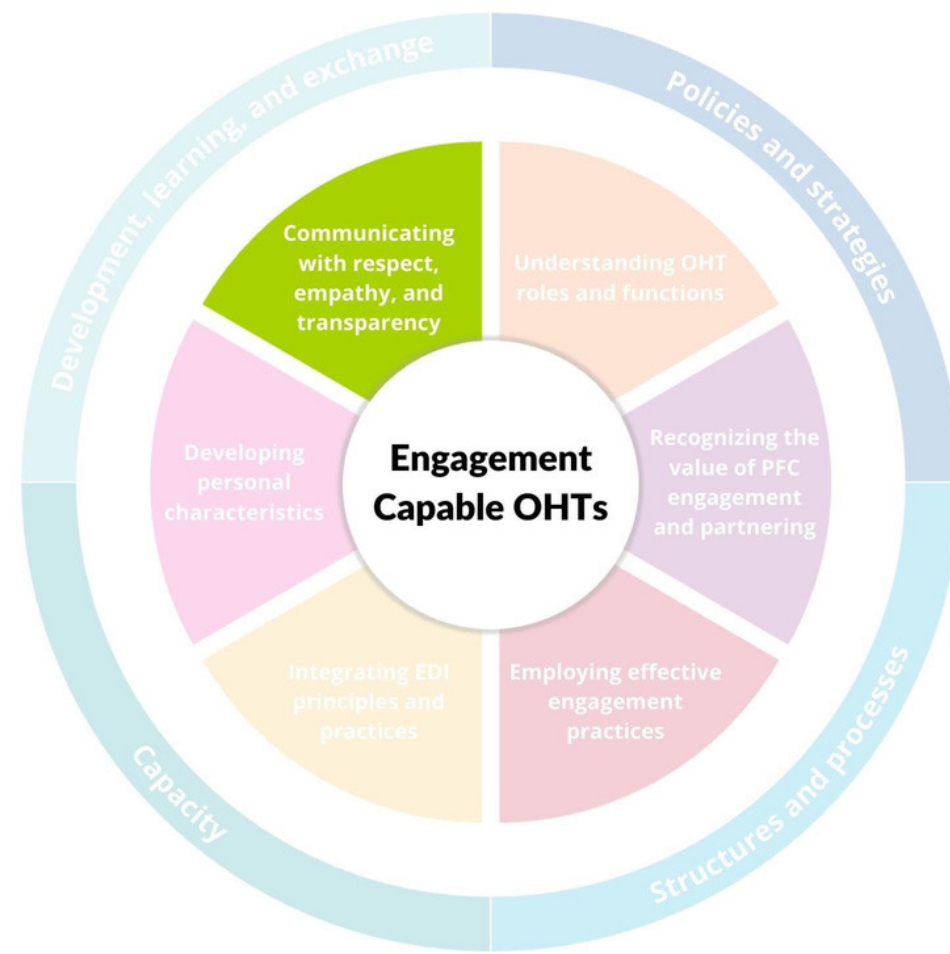
## Integrating equity, diversity and inclusion (EDI) principles and practices into all engagement and partnering work

- Understand the **key concepts of EDI** and how they relate to each other
- Awareness of and practice of **reconciliation and Indigenous cultural safety**
- Understand how **EDI principles may be applied differently across different communities and populations**
- Understand **accessibility requirements** so all can actively participate in engagement activities



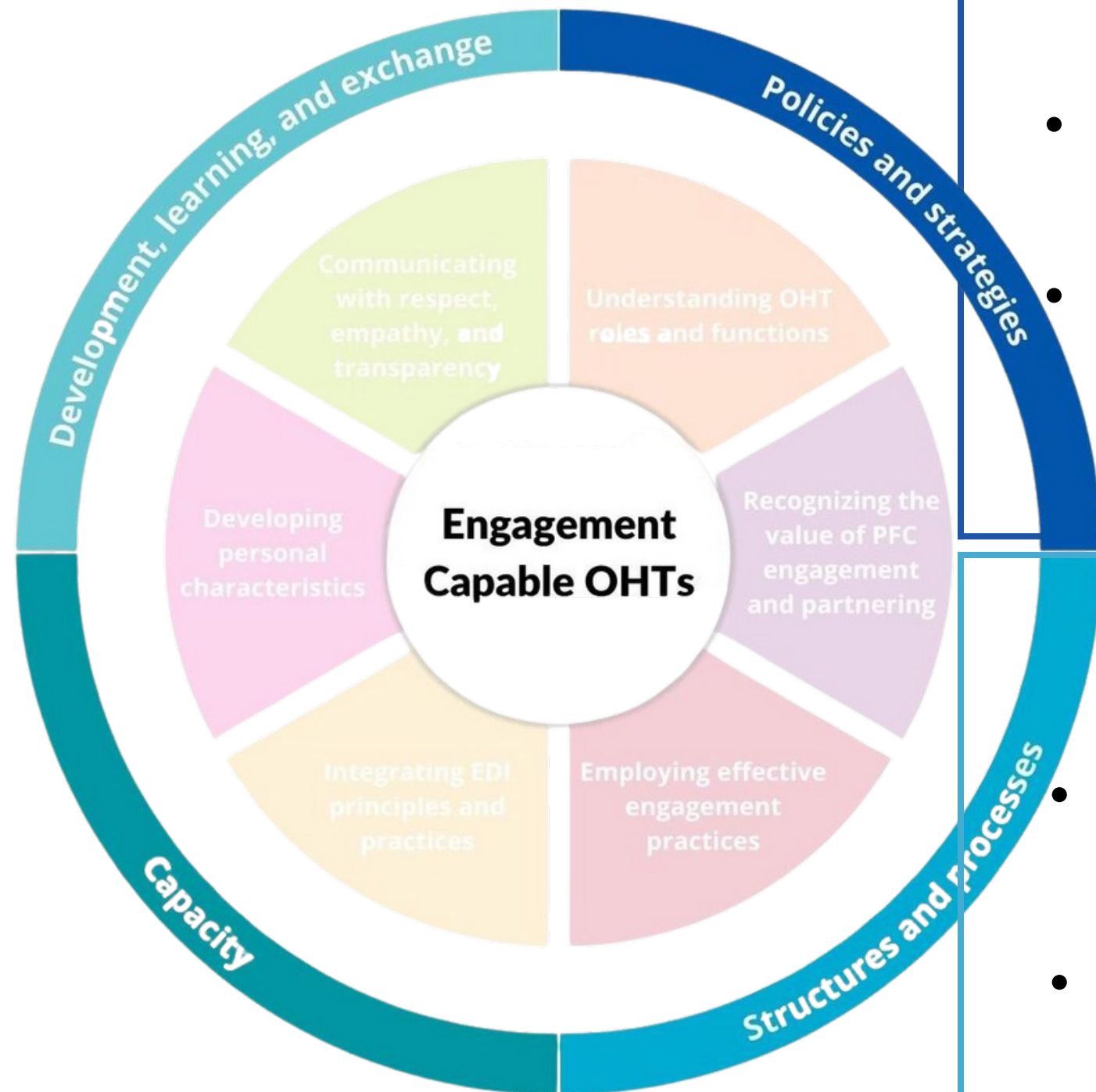
## Developing personal characteristics to ensure meaningful and authentic engagement

- Are aware of the **personal characteristics** that contribute to authentic engagement
- Approach engagement work with **compassion and empathy**
- Demonstrate awareness of **personal /unconscious biases and actively work towards managing / reducing them**
- Acquire and maintain **general skills required to support engagement and partnering activities**



## Communicating with respect, empathy and transparency

- Use **active listening skills** in all interactions to promote mutual understanding
- Provide **feedback in a respectful and constructive manner**
- Use **different language and communication styles to ensure cultural sensitivity and accessibility**
- **Communicate openly and transparently**
- Effectively **share lived experiences to support system change and support doing so in a trauma-informed way**



## Policies and Strategies

- Strategies and policies demonstrate a **clear commitment** to PFC engagement
- **Foundational elements** to support PFC engagement are developed and implemented
- **Communication strategies** to support PFC engagement are in place

## Structures and Processes

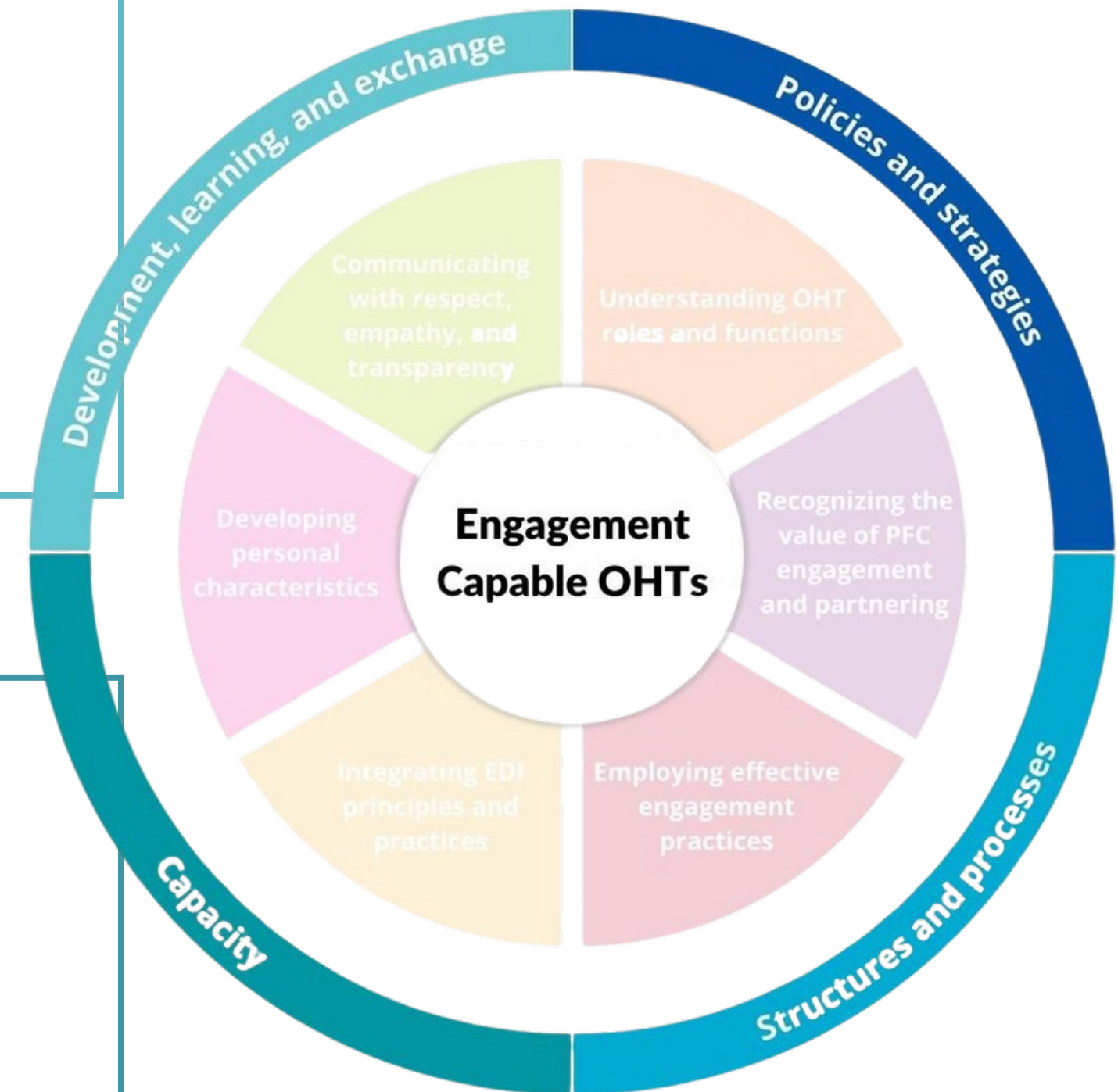
- Engagement structures with **clear goals and operational plans** are in place
- Supports for **PFC partner roles and activities are developed and shared**
- **Procedures** for directly supporting PFC partners are **clearly described and transparently communicated**

## Development, Learning and Exchange

- Ongoing opportunities for **learning and exchange** around PFC partnership and engagement best practices
- **Support is provided** for this by the OHT (through dedicated funding and other mechanisms)
- **Tailored development and learning** for specific groups

## Capacity

- Strong **OHT leadership** in PFC partnership and engagement
- **Dedicated staff member** with training in PFC partnership and engagement
- Dedicated **PFC engagement budget** and **compensation guidelines** for PFC partners
- **Measurement and evaluation** capacity to support learning and improvement



# Resources

Each of the competencies, supports and enablers comes with a list of resources which provide additional information on how to build competencies, or develop supports and enablers

**4. Integrating Equity, Diversity, Inclusion (EDI) principles and practices into all engagement and partnering work**

OHT leadership, staff and patient, family and caregiver partners...

- Understand the key concepts of EDI and how they relate to each other
- Understand related concepts to EDI such as culturally safe environments, cultural sensitivity, social determinants of health and health equity
- Are aware of and practice the principles of reconciliation and Indigenous cultural safety
- Understand how EDI principles may be applied differently across different communities and populations and work in ways that emphasize:
  - Understanding communities and populations facing significant barriers to engagement and/or mistrust of the health system (e.g., newcomers, individuals without OHIP coverage, lower socioeconomic backgrounds)
  - Using a wide range of engagement approaches and supports to facilitate participation from diverse groups with diverse needs (e.g., community meeting spaces, flexible meeting times, provision of child/elder care, compensation)
- Understanding accessibility requirements to ensure all can actively participate in engagement activities (e.g., accessible spaces, provision of materials in large text, interpretation)

**Resources:**  
**Topic: Equity, Diversity and Inclusion**  
[Diversity, equity and inclusion in patient engagement: What is it and why is it so important?](#) (Patient Voices Network, Webinar, 2022)  
[Equity in Engagement Framework](#) (Ontario Health, Framework)  
[OHT Engagement Learning Series: Equity, Diversity & Inclusion](#) (Trillium Health Partners Institute for Better Health, Webinar, 2023)  
[Supporting Equity-Centred Engagement: A step-by-step guide with tailored resources](#) (Public and Patient Engagement Collaborative, Guide, 2023)  
[Recruiting for diversity](#) (Health Quality Ontario, Report)  
**Topic: Engagement with Indigenous partners and communities**  
[Building inclusive and reciprocal relationships with Indigenous organizations and communities](#) (Indigenous Primary Health Care Council, Webinar, 2021)  
[Culturally safe patient engagement: What matters to Indigenous patient partners and guide](#) (BC Patient Safety & Quality Council, 2021)

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**Supporting equity-centred engagement**  
A step-by-step guide with tailored resources

How can we prepare to engage in a way that centres equity?

Understanding equity and related terms and concepts

Recognizing why taking an equity-centred approach to engagement is needed

Reflecting on our roles and positions

How do we plan for engagement that centres equity?

Setting goals for our engagement work proactively and collaboratively

Understanding the populations we hope to engage with

Thinking about who we want to engage with and why

How do we connect with our populations for engagement?

Establishing trust and meaningful relationships

Reaching diverse voices

Reducing barriers to engagement

What engagement strategies can we use to foster equity?

Addressing power imbalances

Ensuring participants feel safe, respected, and valued

How will we continue to foster equity after engagement is complete?

Acting on participant input and following up

Ongoing learning and improvement

**Resources:**  
**Topic: Equity, Diversity and Inclusion**  
[Diversity, equity and inclusion in patient engagement: What is it and why is it so important?](#) (Patient Voices Network, Webinar, 2022)  
[Equity in Engagement Framework](#) (Ontario Health, Framework)  
[OHT Engagement Learning Series: Equity, Diversity & Inclusion](#) (Trillium Health Partners Institute for Better Health, Webinar, 2023)  
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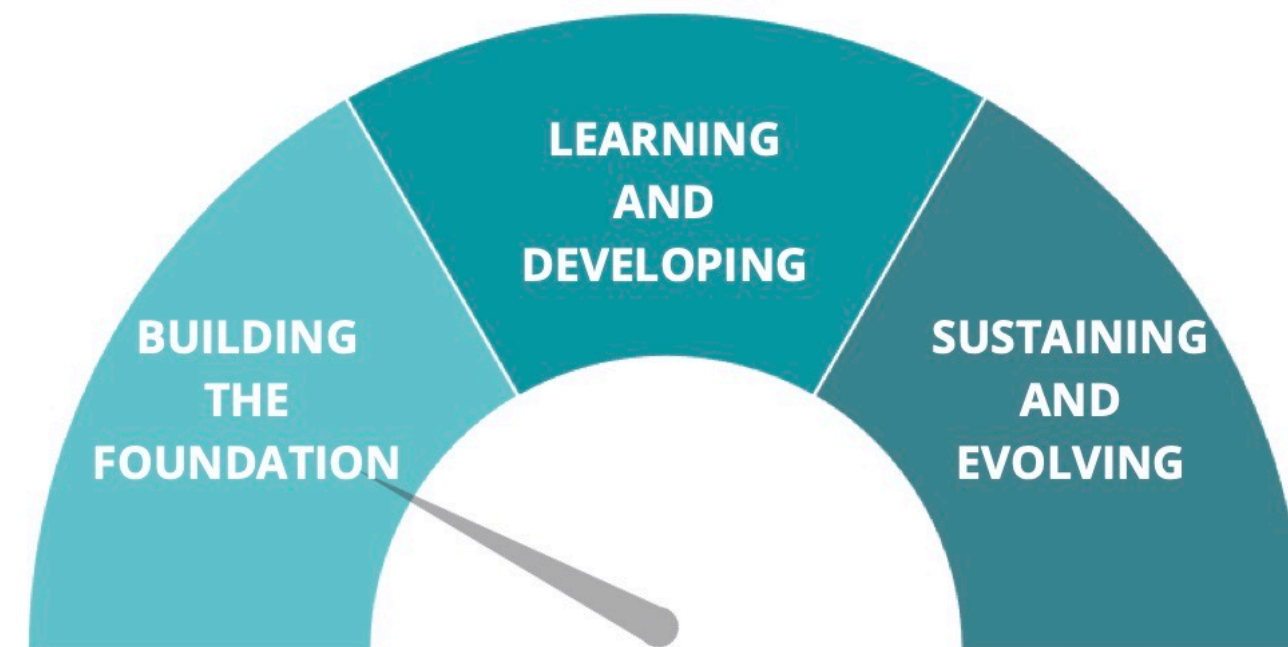
# Element 2: Mapping competencies & enablers to stages of development/maturity levels

## Patient, family and caregiver engagement and partnering in OHTs: A path to maturity

Building an organizational culture that supports and values PFC engagement, and successfully engages PFC partners in all activities, takes time and effort. It is not expected that OHTs will fully embody the values of an engagement capable environment from the outset but that they will build towards this over time. This section outlines the key expectations of OHTs at three stages of maturity:

- Building the Foundation
- Learning and Developing
- Sustaining and Evolving

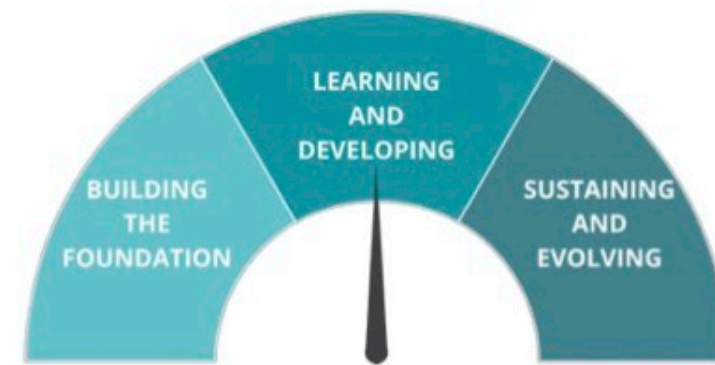
In the descriptions (below), for each of maturity stage, several milestones and expectations are outlined that align with the competencies and enablers identified in the framework. As OHTs build their engagement capabilities, they will move along the maturity path outlined here.



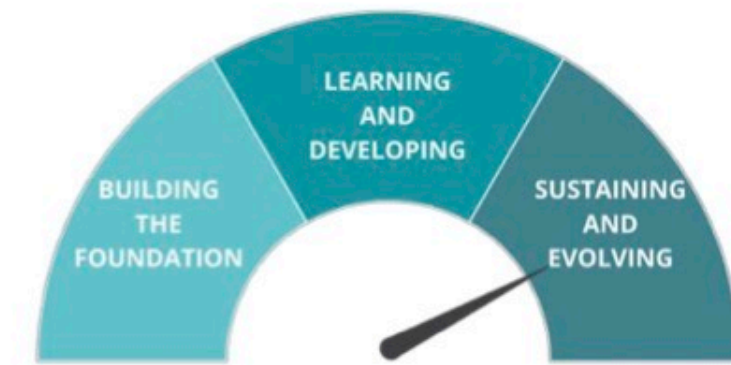
# Sample development milestones



**Level 1: Building the foundation**



**Level 2: Learning and developing**



**Level 3: Sustaining and evolving**

## Fostering a patient-centred culture

- OHT recognizes that the quintuple aim (improved patient experience, better outcomes, lower cost, clinician well-being, health equity) cannot be achieved without the involvement of patient, families and caregivers at all levels
- OHT members work towards building a culture that supports openness, adaptability and curiosity

- PFC partnership and engagement practices are integrated across all OHT planning and operations to foster a patient-centred culture

- Culture of accountability is in place with established OHT-wide expectations for engagement and a clearly expressed philosophy that PFC partnership is foundational to the OHT

## Structures and approaches for engaging and partnering

### Leadership and Governance of the OHT

- Plan how PFC partners will be included in the leadership and governance structure of the OHT

- PFC partners are included collaborative decision-making structure(s)

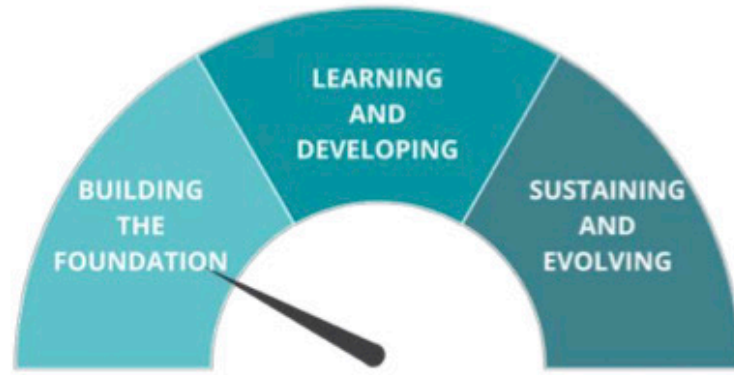
### Engagement Structures

- Determine the structures for engagement (e.g., Patient and Family Advisory Committee (PFAC), committees, working groups) and ways PFC partners will be involved in OHT activities
- Identify roles and responsibilities for OHT members, staff and PFC partners related to engagement
- Identify how information will be shared back with PFC partners and partnership structures following engagement activities
- Develop strategies and approaches that enable the creation of trauma-informed, safe spaces

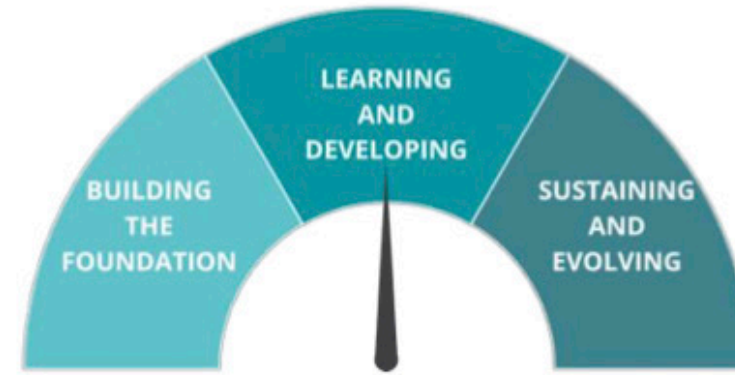
- PFC engagement structures are in place and well supported (e.g., PFACs, PFC partners on committees)
- PFC partners are adequately represented on OHT structures (at least 2 per committee/group)
- Roles and responsibilities of OHT members, staff, and PFC partners related to engagement are clearly outlined and regularly reviewed
- OHT staff report back to PFC partners, PFACs and others on how input from engagement activities is used

- Meaningful and authentic engagement and partnership practices driven by the needs of PFCs and the communities they serve

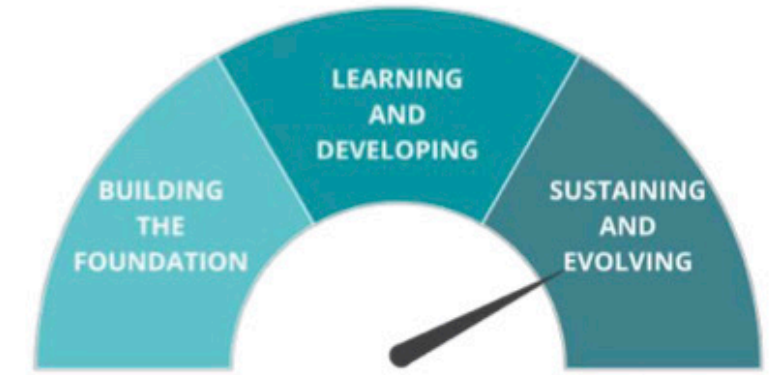
# Sample maturity milestones



**Level 1: Building the foundation**



**Level 2: Learning and developing**



**Level 3: Sustaining and evolving**

## Policies and strategies to support the work

### *Patient, family and caregiver partnership and engagement strategy*

- PFC Partnership and Engagement strategy is collaboratively developed and adopted by the OHT

- PFC Partnership and Engagement strategy has is regularly reviewed/ revised  
Workplans to implement the strategy are in place including metrics to assess the implementation

### *Patient, Family and Caregiver Declaration of Values for Ontario*

- Patient, Family and Caregiver Declaration of Values for Ontario is adopted by the OHT

- PFC Declaration of Values for Ontario is a key element of the OHT's work. It is shared publicly, language from the declaration is embedded in OHT documents
- Partner organizations are supported to adopt the PFC Declaration of Values for Ontario

- OHT partner organizations have adopted the PFC Declaration of Values for Ontario and it continues to be highlighted and supported within the OHT

### *Funding for patient, family and caregiver engagement activities*

- Funding and budget required for PFC engagement and partnering are considered
- Compensation policies for PFC partners are collaboratively developed and implemented

- Clear budgets for PFC engagement and partnering are in place
- Compensation policies are reviewed as needed

- Strategies and policies related to the funding of PFC engagement (e.g., staffing, PFC partner compensation, budget allocations) are clearly described and implemented

### *Recruitment and communication strategies*

- Recruitment strategies and approaches are identified
- Communication strategies and approaches that emphasize open and transparent communication

- Develop recruitment strategies tailored to different communities and populations including those who face significant barriers to engagement



# Action plan for implementation

OHTs can implement this framework using the following steps:

STEP 1: BUY-IN	STEP 2: SELF ASSESSMENT	STEP 3: PRIORITIZE AND ACTION AREAS OF FOCUS	STEP 4: EVALUATION
<p><b>Executive leads / leadership</b> Identify this work as a priority and adopt it for your OHT</p> <p><b>Identify your framework implementation team</b> Include leadership, engagement support, PFC partners</p>	<p><b>Review and discuss competencies, supports and enablers (current state)</b></p> <p>Identify and agree on areas of strength and areas for growth and development</p> <p>Determine where your OHT sits on the maturity scale</p> <p>Determine who else to share the capability framework with (e.g., new and existing staff, PFC partners)</p>	<p><b>Identify short- and longer-term priorities for building competencies and developing supports</b> across areas identified for growth</p> <p>Review resources and <b>identify actions and timeframes for relevant OHT members (leadership, staff, PFC partners)</b></p>	<p>Identify <b>simple monitoring metrics</b> across the framework domains.</p> <p>Monitor these metrics over time to <b>track growth (or set-backs)</b>. <b>Modify your action plan as required</b></p> <p><b>Continue to orient/train new staff and PFC partners using the framework</b></p>

# Putting the framework into action: Perspectives from OHT stakeholders on the value of this work



**Lindsay Wingham-Smith,**  
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Mississauga OHT



**Lotje Hives,** Patient Family  
Caregiver Council  
Representative and  
Collaboration Council Tri-  
chair, Nipissing Wellness OHT



**Reham Abdelhalim,**  
Population Health  
Management and  
Evaluation Lead,  
Burlington OHT

# Framework Implementation Supports

- PPEC team participating in **ADVANCE coaching session** (October 25<sup>th</sup>) – focus on PFC representation in collaborative governance
- Working group members available as engagement capability **champions**
- PPEC team available for limited **consults and targeted coaching** (more details to follow)
- Future, **more focused webinars?**
  - Add your thoughts on what we should focus on (and which OHT members) in the chat or in the evaluation survey



# Contact us



<https://ppe.mcmaster.ca/research/supports-for-ohts/>



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