

Evaluating the Impact of Patient Partnering



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So, you want to evaluate your patient partnering activities?

You probably know in your gut if partnering with patients, families, residents or clients is making a difference to your work. But it's important to be able to show the impact and value of patient partnership to others—your organization's senior leaders, board, community—and, of course, to patient partners* themselves.

This short resource is focused on using surveys to evaluate the impact of patient partnering.

This resource introduces some new survey questions aimed at capturing the impact of patient partnering on a project, committee or other activity focused on improving health care.

These questions are grounded in a review of research literature, were co-developed with patient partners, and have been piloted at Ontario Health (Quality) over the last year.

*"Patient partners" in this resource refers to patients, clients, residents, caregivers and other health service users you may be collaborating with.

Using surveys to evaluate impact

Surveys have several benefits as an evaluation method. They are relatively easy to set up, administer and analyze, especially if you use an online survey tool.

Surveys can also help you assess the impact of patient partnering in an ongoing, systematic way. This can be especially useful when you are working with patient partners on a variety of projects.

Of course, surveys complement other evaluation approaches such as collecting stories, case studies, and more formal program evaluation methods. We encourage you to think about what kinds of impact data are most important to your audience, what feedback mechanisms are most appropriate and preferred by your partners, and to choose your evaluation methods accordingly.



Tip: The new survey questions in this resource can be adapted for interviews or group discussions about the impact of patient partnering. A survey format may not be the most appropriate or preferred way for some patient partners to give feedback.

Many great patient partnering evaluation surveys already exist (page 13). See [Evaluation Resources](#) for links to some of the most popular and tested ones currently used in health care settings.

Planning before you survey

Take time to consider your audience—is it your patient partners, internal staff in your organization, senior leadership, grant funders, the wider community, or all or some of the above? What kinds of patient partnering impacts are most important to them? What patient partnering activities do you want to focus on? When is the best time to survey and report back?

By thinking about these questions—and following three steps described below—you'll be able to focus your evaluation activities and get the information that matters most.

The impacts you focus on in an evaluation survey will differ depending on your audience. It's good to talk with your intended audience to find out what is important to them and, better yet, ask patient partners to join you in developing your evaluation surveys and materials.



Tip: Your patient partnering activities are likely making a difference in ways you have not anticipated. Be sure to include open-ended questions in any evaluation activity, to allow people to share what is top of mind for them.

Step 1:

Identify your audience and what matters to them

By understanding your audience and the information they need, you can get to the heart of what people want to know. Almost everyone we have talked with—patient partners, health care professionals, and organizational leaders—has said they are interested in understanding the specific and positive impacts patient partnering is having on health care projects, programs, and service delivery.

Common interests include:

- **How patient partners are contributing ideas and insights to discussion and decision-making (at the board level or on leadership committees)**
- **How patient partners are identifying problems and areas of focus for improving the quality of care**
- **How patient partners are identifying and validating improvements in service design or delivery**

What impacts will you measure?

Our literature review and discussions with patient partners and health professionals surfaced other potential impacts of patient partnership that may be of interest to different audiences.

You may want to understand how patient partners are...

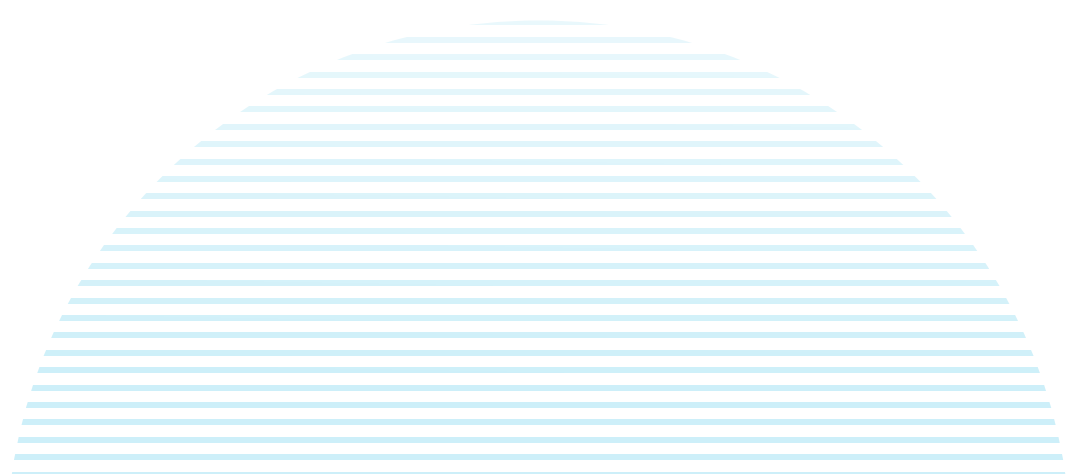
- Increasing their knowledge of your organization, the health system, and quality improvement
- Growing their participation skills and sense of empowerment
- Increasing their confidence and trust in your organization
- Understanding the impact they are having
- Benefiting from positive impacts on their healing and wellbeing

You may want to understand how staff in your organization are...

- Increasing their knowledge of patient experiences and perspectives
- Increasing their confidence and skills in patient partnering
- Understanding the value and impact of partnering on their work

You may want to understand how patient partnering in your organization is...

- Impacting employee engagement
- Improving team performance
- Benefiting organizational culture
- Helping achieve program and strategic objectives related to quality and safety



Step 2:

Decide which activities to evaluate and who you will survey

You might be doing many patient partnering activities that could demonstrate impact in your organization. It can be helpful to pick one program or activity and start your evaluation there. What you pick will depend on who the audience is for your evaluation results (see page 6) or why you are looking to evaluate your patient partnering in the first place. For example, to understand the impact of patient partnership on staff attitudes, you might choose to evaluate participation in hiring committees or staff training.

We recommend surveying patient partners and staff involved in the activity you are evaluating. Both perspectives are important for understanding impact.

In general, patients, staff and leaders will have different and complimentary experiences and may see value and impact differently. Where patients and staff differ in their responses, there is an opportunity to identify a gap in communication or other challenges with your partnering activity.

Hearing from staff also allows you to collect feedback to share with patient partners about the value and impact of their contributions.

Step 3:

Select your survey questions

If you are already using a survey to evaluate your patient partnering activities, consider adding the following questions to probe further. If you are creating an evaluation survey from scratch, we recommend adapting one of the tools listed at the end of this resource and including the questions below.

These questions are designed to capture the impact of patient partner participation on quality improvement projects. Revise these questions for other forms of engagement such as participation on committees or for one-off engagements like interviews, focus groups or community consultations.

A two-question series to evaluate the impact of patient partnering on the project

Question 1

I can identify examples of where patient/ caregiver input has influenced the direction of the project.

- Strongly disagree
- Disagree
- Neutral
- Agree
- Strongly agree



Why this question?

This is the first of two questions on impact and helps the patient partner or staff member begin thinking about the impact of patient partnering more generally.

Ask a follow-up question

If your respondent answers: Neutral, Disagree or Strongly Disagree to question 1, ask:

Question 2a

Can you tell us more about why you think that might be?



Tip: If the people answering your surveys aren't seeing impact, this is an opportunity to learn more about your organization's partnering work. You may need more time to assess the project, or to ask different questions. You may also want to look more closely at the engagement activity to see if there is room for improvement.

If your respondent answers Agree, or Strongly Agree to question 1 – ask:

Question 2b

In what ways have patient partners influenced the project?

Check all that apply and share examples.

Contributed to the initial focus of the project

Please share an example of how this made a difference:

Contributed to project meeting discussions

Please share an example of how this made a difference:

Helped staff working on the project to focus on patient/caregiver needs

Please share an example of how this made a difference:

Contributed ideas to the project as it evolved

Please share an example of how this made a difference:

Contributed to recommendations or decisions made as part of the project

Please share an example of how this made a difference:



Tip: Patient partners shared that it is important to give specific options to respondents to help prompt examples and make the qualitative feedback easy to summarize. You can also include an "Other" line to allow people to include open-ended comments.

Impacts on Patient Partners

Patient partners recommended focusing on the impact that participating has on their ability to take information back to their communities and to engage with their communities on similar issues.

These are two common questions used in evaluating knowledge translation and mobilization that measure whether knowledge is gained and if that knowledge is useful.

Questions to evaluate the project's impact on patient partners

I gained new knowledge, information or skills through participating in this project.

- Strongly disagree
- Disagree
- Neutral
- Agree
- Strongly agree

I have used the knowledge, information or skills gained from this project to help my work with other groups.

- Strongly disagree
- Disagree
- Neutral
- Agree
- Strongly agree

Please share some examples:

Tips for reporting back on evaluation results

Give patient partners feedback on the impact of their participation—soon and often. Share what you've heard through both the staff and patient partner parts of the evaluation.

Tell staff about the impacts that patients have shared with you, as well what you are hearing organization-wide about patient partnering. Aim to celebrate success and inspire staff who may be experiencing challenges to see what is possible.

Be mindful of the timing of senior leadership meetings, board meetings, grant reporting, and annual reports. Be ready to report back on impacts that align with organizational priorities. Stories help the data come alive—try to capture impact stories and quotes from your evaluation results to illustrate how patient partnering is improving quality of care, experiences or outcomes, and how patient partnering is shifting organizational culture.

Finally, as you are reporting back, don't forget to include what you learned about room to improve the impact that patient partnership can have on the work of your organization—and develop a plan to address these areas.

Potential longer-term impacts of patient partnering

You likely also want to know how patient partnering activities are adding up to a better patient experience, greater patient safety or better patient outcomes over time. While these impacts are difficult to measure directly, emerging evidence shows a significant connection between effective patient partnering activities and these quality improvements.

As you plan your evaluation strategy, it's a good idea to keep medium- and long-term impacts in mind. Identifying connections between the short-term and more distant impacts of patient partnering will help you assess the overall value of your partnering activities.

Medium- and long-term impacts of effective patient partnering may include:

- **Increased engagement in ongoing initiatives for patient and caregiver partners**
- **More effective health and quality improvement interventions**
- **Increased adherence to treatment and care regimens**
- **Improved patient safety**
- **Improved patient experience**
- **Improved patient outcomes**
- **Greater patient satisfaction with a program or service**
- **Greater staff satisfaction or engagement**
- **Active contribution by patient partners in other health care initiatives in their community**

Evaluation resources

Public and Patient Engagement Evaluation Tool

If you are also looking to evaluate the process and experience of patient engagement (which we definitely recommend), the [Public and Patient Engagement Evaluation Tool \(PPEET\)](#) is a great resource. It includes surveys for patients, staff leading engagement projects and for organizational leaders.

Engaging with Impact

Many evaluation resources focus on evaluating the impact of patient partners either qualitatively (e.g. through interviews) or through administrative data. For example, see [Engaging with impact: Targets and indicators for successful community engagement by Ontario's Local Health Integration Networks](#) (see pages 93–97 for the section). A scorecard for evaluating engagement, which offers some qualitative and quantitative indicators to consider.

Patient and Public Engagement Evaluation Toolkit

For more, see the [Patient and Public Engagement Evaluation Toolkit](#) by the Centre of Excellence on Partnership with Patients and the Public, which has reviews and summaries of a number of different patient engagement evaluation resources.

Canadian Patient Safety Institute

The [Canadian Patient Safety Institute](#) has a chapter in their guide on patient engagement that provides measures and tools that can evaluate patient engagement at the point of care, and organizational level, to help integrate patient engagement into the organization.



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