

PATIENT PARTNERSHIP: LESSONS LEARNED THROUGH CO-DESIGN



About Us

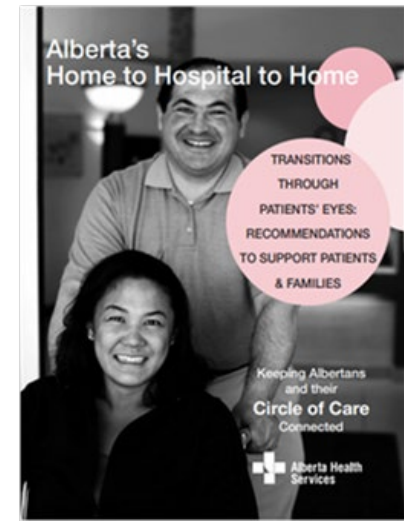
The Patient Transitions Resources Team is comprised of patient and family advisors from across the province and Alberta Health Services (AHS) Primary Health Care Integration Network (PHCIN) staff members. AHS tasked this team to work in alignment with [Alberta's Home to Hospital to Home Transitions Guideline](#) to explore what patients and families need for a safe and patient-centred home to hospital to home transition journey.

On our journey to co-designing resources in equal partnership with patients and families, we have learned a great deal about creating meaningful, trusting relationships that support patient engagement and collaborative team culture.

We are sharing our applied learnings to help set up teams for successful patient engagement in co-design projects. These are based on the successes, experiences and challenges from this Patient Transitions Resources team.

“We know true collaboration happened when the idea can no longer be traced to one person.”

- Simon Sinek



Read the full [report](#)

Getting Started

Team Selection

Interviewing people who are interested in joining the project is important for understanding their 'why' for engaging in the work and also to ensure a good fit. It is an opportunity to build the understanding that your work is with patients, for patients.

Capitalize on knowledge and experience

Involving experienced patient advisors in your interviews creates a trusting environment and demonstrates your commitment to collaborate with patients every step of the process. It helps you explain the purpose and intention of the project in plain language for everyone's benefit.

Orientation

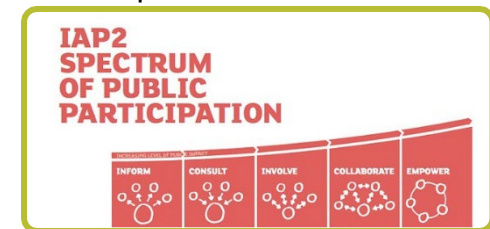
An on-boarding and inclusive orientation process that includes current patient advisors helps new members see that the work is meaningful, necessary and has achievable targets.

Meet and greet

As new team members join, arranging an individual meet and greet is very important in order to get to know each new member personally and build trust.

Group kick off session

Host a session to bring together the project team to establish common goals and shared purpose. It helps set the tone for how the team will work together as equal partners and establish an agreed upon level of engagement for the group. The [International Association of Public Participation \(IAP2\)](#) offers a useful tool that illustrates the level of participation with patients and families, moving from advisors to partners. Within our work, we engaged patients and families at the Collaborate and Empower levels.



Source: Tim Bonnemann,
www.flickr.com/photos/planspark/12249559465

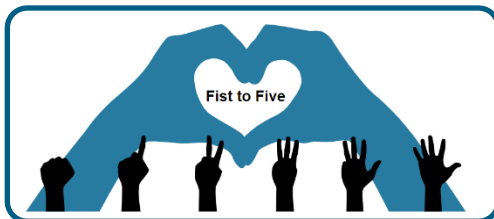
Building Meaningful Relationships

Check ins /icebreakers

At the beginning of each meeting, check ins/icebreakers are valuable tools for building respectful relationships, gaining insight into factors that may influence how team members “shows up” on that day, and setting the tone for a positive meeting. This fosters group empathy and resilience by inviting each member to be present, seen, and heard. It emphasizes presence, focus, and group commitment.

Check out

At the end of each meeting, check out using the **Fist to Five** practice to show how everyone feels about what was accomplished. This reflective practice helps teams like ours continually evaluate and refine their

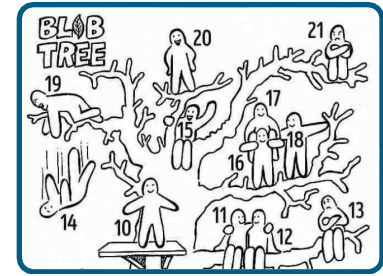


Source: Second Rise LLC,
www.lucidmeetings.com/glossary/fist-five

collaboration and engagement approaches.

Team building

Adding short team building activities into meetings – for example: get to know you games, the **Blob Tree**, sharing 2-minute stories (for example, what brought you to the group/your journey as a patient and family advisor), **Two Truths and a Lie** - enables teams to have fun together and enjoy the work.



Source: © Pip Wilson and Ian Long,
www.blobtree.com

Clear expectations

Establishing principles, processes, values and clear roles ensures all team members have a shared understanding of expectations. Everyone can bring their best selves to the work.

Collaborating & Co-Designing with Patient & Family Advisors

Keep your eyes on the prize

Setting a clear purpose and goals and staying focused on them can help you keep your eyes on the prize! A

Team Canvas or **Project Canvas** developed with everyone's participation helps to build shared understanding and commitment to collaborate.

Everyone is unique

Respecting and appreciating everyone's skills and what they bring to the group sets the team up for success. Lean into the group's diversity and experience by relying on the individual strengths of the team members.

Enable freedom and confidence

Have the freedom and confidence within the group to:

- ask questions and offer suggestions;
- challenge assumptions;
- encourage diverse opinions;
- ask for clarity;
- set goals, make plans, and implement and review them

Learning from others

Listening and learning from patient stories is essential. A two-minute story is a technique to help patient volunteers be comfortable and confident sharing their experiences so others can learn and empathize.

Use plain language

The language we use in patient-centred work is important. There is a true difference between **patient speak** and **system speak**. Avoid healthcare jargon and acronyms at all costs! Using plain language and formats helps ensure that the work will be heard and understood by the intended audience (the patient).

Keeping pace

Reviewing materials before meetings helps prepare the team and creates space in the meeting to ask questions and build understanding.

Sustaining Meaningful Engagement

Open communication with partners

Counting on your staff liaison(s), or your primary contact person to keep the lines of communication open with various departments/teams will influence your work and ensure that your work will have impact.

Leadership support

Leaders need to support the team members and give them access to tools, resources and opportunities as equal partners in designing initiatives. Within our team, management validates that the work we are doing is essential and they will support the awareness and implementation of resources that our team designs.

Camaraderie among team members

Building trust and respect among team members is a precursor to satisfaction in a job well done. Although we are developing a work product, patient partners are volunteering their time. Take care to manage individual requests and be mindful of the team workload.

Make it fun

Having a good time working together makes tasks enjoyable. Some examples of our strategies include – online parties, appreciation cards, virtual celebrations, sharing silly emails, etc.

Collaboration is key

The freedom in co-designing with patients results in the work being meaningful, intrinsically interesting and therefore satisfying. This fuels continuous engagement and excitement in patient partners.



Helpful Tools:

- Use a secure sharing platform accessible for all team members to access project work.
- **Team Canvas** helps team members be aligned on what is most important to them.

Team Canvas Basic Version 0.8 | theteamcanvas.com | hello@theteamcanvas.com

Most important things to agree on to kick-off effective team project and get members to know each other better.

Team name Date

GOALS What are our most important goals? What are our top goals for our mission? What are our most important goals? What are our most important goals?

ROLES & SKILLS What are the most important roles and skills that we need to be successful? What are the most important roles and skills that we need to be successful?

PURPOSE What are we working on as a group? What are we working on as a group?

VALUES What are our values? What are our values? What are our values? What are our values?

RULES & ACTIVITIES What are our rules and activities? What are our rules and activities? What are our rules and activities? What are our rules and activities?

Source: Team Canvas,
www.canvasgeneration.com/canvas/team-canvas-basic/

If you would like to learn more about the tools or the Patient Transitions Resources work, contact a member of the Primary Health Care Integration and Innovation Team.

Email: PHC.IntegrationNetwork@albertahealthservices.ca

- **Project Canvas** can be a helpful project planning template.
- Use the [IAP2 Spectrum](#) to determine the level of patient and family advisor engagement.
- [Understanding Co-Design](#): Developed by the Strategic Clinical Networks™ Patient and Family Engagement Team, the purpose of this resource is to share co-design principles, approaches and resources successfully used by others, and outline how it can support the meaningful engagement of patient and family advisors.
- **Co-design Playbook**: Using integrated care partnerships to design better health.

Contributors

Thank you to the Patient Transitions Resources team members for their contribution to the development of this document.

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