Today’s Webinar

• Setting Context / 5 min.

• Examples / 10-15 min.

• How to Engage Patients as Partners / 15 min.

• Toolkit / 10 min.

• Reflection / 10 min.
Setting Context
Partners vs. Patients

Creating value jointly with customers. Value is not created in the company and then exchanged with customers; rather, value is co-created by the company and the customers.

-Prahlad Ramaswamy
The Evolution

Back in the day, healthcare organizations were built around the organizations’ needs...

For awhile it worked well for patients...

Now we need to build it around their needs, expectations, values going forward and treat them as customers that have many choices /options...
Healthcare Evolution of Engaging with Patients

Goal / Mindset: Leverage these approaches to actively listen and partner with our patients at every touch point in their healthcare journey across all improvement /innovation efforts.

- Surveys
- Focus groups
- Shadowing
- Interviews
- Journey Mapping
- Patient Advisory Councils
- Peer Navigators
- Co-design
  - Patients on project team
  - Creating value with us
Why Partner with Patients

• Transform care in a way that truly matters to patients.

• Patients highly value sharing their stories and ideas with us.

• Challenges ‘assuming’ and ‘knowing’ with humble inquiry.

• Industry leading companies have been successfully leveraging customers as partners for decades to strengthen their loyalty and transform their business.
Example: **Paramedics as Healthcare Extenders**

- **Project Type:** Care Team of Future / New Partnerships
- **Opportunity:** Give low income housing residents alternative resources to 911 when they need care
- **Innovation:** Using paramedics to extend education and in-home assessments, care, referrals
- **Status:** In ideation / prototype phase with patients

After having 30 real-time phone calls with patients they learned:

- Can’t count on patients letting you into their home
- Call 911 for everything or call no one at all
- Patients do not know of other resources
- Co-design of a health fair at housing community to teach residents about alternative resources for care and offer opportunity for in-home assessment
Example: **Behavioral Health Integration**

- **Project Type:** Care Delivery Model /Role
- **Opportunity:** Ensure more patients have the opportunity for behavioral health services
- **Innovation:** Behavioral health role is authentic team member; participates in huddles, co-visits, etc.
- **Status:** Rapid experiments in progress
  Working toward a pilot

**Learnings:**
- Increase of patient engagement in process
- Get to know one another
- Trust Respect Understanding
- “Wow!” Powerful for the patient
- Sparks ideas and thoughts
- We are now on the same page
- BH learning what the patient is getting from provider-not translated through the patient
- It informs BH’s work
Example: Clinic Registration Forms

- **Project Type:** Information collection / capture
- **Opportunity:** Ensure patients can provide accurate information that can help them receive services
- **Innovation:** Provide patients with questions that they can confidently and comfortably answer
- **Status:** design/ prototype phase with patients

After running two co-design sessions with patients, some insights

"It's not about the forms, I was left in the waiting room without knowing why or how long I would wait...they were not very caring.” - patient

"It's not a super high cost thing to sit down with some patients ...And the feedback was worth way more than the time we spent...We don't do enough of it. To see it from the eyes of the patient is so different.” - catalyst
How Do I Do This?
Sampling

Who

- Defined patients; i.e., Medicare member 65+ yo.
- Paneled at ‘Clinic X’
- Likely that patient is willing/ able to participate for project duration
- Minimal to no cognitive impairment
- Ability to communicate clearly, hold a conversation, speak in a group
- Open to change and transformation
- Able to identify care delivery that clinic is doing well and not so well
- Available and willing to attend scheduled meetings
- Available and willing to keep self-journal

How many

- Ideal 4-6 of the same patients for duration of program/ project
- At least 3-4 per phase if different patients
- Have ‘back-ups’ so no one patient gets fatigued
Ethics

> Consent
- Design consent to cover duration of project
- Complete the consent process prior to engaging patients
- Include language for video / audio capture as necessary
- Include NDA if there will be proprietary/prototypical product involved

> Incentives
- Thank you gifts: gift cards, groceries, vouchers, etc.
- Amount can vary
- Incentive plan; per engagement thank you
Activities

Designing the Engagement Structure

- Define when it will be valuable to bring in patients
- Determine best activities/ methods to use at each phase of work
- Define questions you need patients to answer before they engage
- Plan how to best ‘skill patients up’ to participate with comfort /confidence
- Create an engagement plan for short and long term that the full team including patients can reference.
- Estimate and communicate the amount of time; e.g., no longer than 1.5 hours per engagement
- PROVIDE FOOD / SNACKS to ensure success!
Tool Kit + Resources
Patient Partners for Project Duration

Co-design (in-person + virtual)

**Discovery**
- Understand experience
- Define problems/ gaps
- Frame opportunities

- Observations
- Shadow
- Interviews
- In-home visits
- Empathy Mapping
- Journey Mapping

**Ideation**
- Generate concepts
- Define / Prioritize Solutions
- Design ideal experience

- Brainstorming
- Storyboarding
- Role Playing
- Enactments

**Do / Try**
- Develop ideas
- Test ideas/ solutions
- Narrow solutions

- Prototype
- Rapid Experiments
- PDSAs
- Enactments
- Simulations

**Impact**
- Pilot ‘super-users’
- Early adopters when operationalized

- Pilot solution
- Measurement
- Change Package
Tool Kit

Process Template: Patient + Caregiver Co-Design

Co-Design
Creating value jointly with customers. Value is not created in the company and then exchanged with customers; rather, value is co-created by the company and the customer.

Objectives
1. To engage patients and caregivers as active participants in co-creating optimal models of care for segment (care group) 3 and 4 patients across all work streams.
2. To develop a pilot program that may be leveraged into an ongoing avenue for member and caregiver participation in care model development.

Expectations
1. Participate in three one-hour meetings, one per month, at Kaiser East Interstate medical office building.
   - Meetings will start in March or early April 2013, and end in June 2013.
2. At all the meetings, listen to ideas about potential care delivery solutions and provide input, suggestions, thoughts, and recommendations.
3. Complete self-journaling based on questions or themes discussed at the monthly meetings.
   - Appropriate time commitment 25-30 minutes per week.
4. Mid-month, meet for approximately 30 minutes with a Kaiser team member at your home or care facility to discuss your thoughts on self-journaling assignments.

Sample Frame

<table>
<thead>
<tr>
<th>Member</th>
<th>Caregiver</th>
<th>(n=1 male, n=1 female)</th>
<th>(n=1 family member, n=1 facility-based)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruiter</td>
<td>Member</td>
<td>Recruiter</td>
<td>Caregiver</td>
</tr>
<tr>
<td>Lisa Isabelle</td>
<td>Daythe Green</td>
<td>Lisa Isabelle</td>
<td>Georgetta X (Facility)</td>
</tr>
<tr>
<td>Anna Gilman</td>
<td>Lisa Isabelle</td>
<td>Anna Gilman</td>
<td>Esther's Son</td>
</tr>
<tr>
<td>Esther Snow</td>
<td>Lisa Isabelle</td>
<td>Esther Snow</td>
<td>Grace / Jane (Daughters)</td>
</tr>
<tr>
<td>Carl Smith</td>
<td>Lisa Isabelle</td>
<td>Carl Smith</td>
<td></td>
</tr>
</tbody>
</table>

Participant Selection Criteria

<table>
<thead>
<tr>
<th>Member</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicare member age 65+ in segment (care group) 3 or 4</td>
</tr>
<tr>
<td>Fulfilled (care group) 3 or 4</td>
</tr>
<tr>
<td>Likely that member will be able to participate for the full 3 months</td>
</tr>
<tr>
<td>Minimal to no cognitive impairment</td>
</tr>
</tbody>
</table>

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<tr>
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<tbody>
<tr>
<td>Caring for a Medicare member age 65+ in segment (care group) 3 or 4</td>
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<tr>
<td>Ability to communicate clearly, hold a conversation, and speak in a group</td>
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<tr>
<td>Open to change and improvement</td>
</tr>
<tr>
<td>Able to identify where Kaiser is doing well with</td>
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</tbody>
</table>

- **Tools / Templates**
  - Recruit Script
  - Welcome + FAQs
  - Participant grid/ matrix
  - Process Template; objectives, duration, goals, criteria
  - Value + Methods Framework
  - Logistics + Facilitation Template
  - Idea/ Questions/ Results Template (for the team)
  - Patient Partner Self-Journal Entries
Reflections
Reflections: Engaging Patients as Partners

1: **Leverage** our patients as valuable assets and change agents to make the safety net better together.

2: **Engage** patients as ongoing partners with our project teams at the hospital and clinic level to co-design optimal healthcare delivery solutions.

3: **Establish** longitudinal relationships with our patients to enable deep, meaningful, continuous engagement and input to transformation work.

4: **Expand** traditional patient engagement behaviors with the use of virtual modalities.
Next Topic:
June 15: Buy versus build?