

PEOPLE CENTRED CARE: CLIENT AND FAMILY ENGAGEMENT	Quality and Risk Management QRM - 120
Issuing Authority	Judy O’Keefe, Vice President Signed by Judy O’Keefe Dated: November 4, 2022
Office of Administrative Responsibility	Quality, Patient Safety and Risk Management
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Level	One (I)
Original Approval Date	November 4, 2022
Effective Date	Upon Posting
Scheduled Review Date	November 2025
Actual Review Date	
Revised Date(s)	

Overview

Eastern Health is committed to maintaining a safe, secure, comfortable, inclusive, and equitable healthcare environment that demonstrates respect for the diverse needs of clients, families, and staff and supports People Centred Care (PCC). PCC encompasses the term Client- and Family- Centred Care (CFCC).

The word *client* also means *patient* and *resident*.

At every organizational level, PCC practice includes meaningful engagement of clients and/or family in partnership with health care providers in promoting and maintaining client health; designing and developing services; and evaluating and improving service delivery.

[The CFCC Engagement Framework](#) sets the foundation for client and family engagement across the organization and supports both formal and informal ways to engage.

POLICY

1. All service areas meaningfully engage and use client and family input, feedback, and partnerships at all levels, across multiple domains of our health care system.

2. Engagement takes place at the beginning of any activity that can have an impact on the client and family experience with Eastern Health services (e.g., in development/design, evaluation, and improvement activities, policies and practices).
3. [The Client and Family Engagement Framework](#) is followed, and engagement takes place in one or more ways along the continuum of Share, Consult, Involve, Collaborate.
 - 3.2 Engagement of clients and family includes members of the general population (e.g., public forums, experience of care surveys) who have accessed services with Eastern Health, and/or formal volunteer client and family advisors who have lived experiences with healthcare services.
4. Eastern Health recruits, formally onboards and engages Client and Family Advisors to partner in development and improvement of healthcare services.
5. Feedback loops are identified and implemented as part of engagement planning, to support advisors being aware of the impact of their engagement.
6. Evaluation of client and family advisor engagement is completed to ensure meaningful engagement practices.
7. Client and family advisors are reimbursed by the relevant service area for costs incurred for engagement activities.
8. Client and Family Advisors are included in annual Eastern Health Volunteer Week activities, by Volunteer Resources, for recognition and appreciation.
9. The CFCC Manager will engage and support an advisor working group to plan and facilitate an annual networking session to support role development and meaningful connection with advisors.

Scope

This policy applies to all employees, students, physicians, volunteer client/patient/resident/ family advisors and external partners affiliated with Eastern Health.

Purpose

- To identify our commitment and collective responsibility to meaningfully engage and partner with our clients, patients, residents, and families, who are not in a formal advisor role.

- To support understanding of the formal volunteer client and family advisor role and support engagement and sustainability practices for meaningful engagement of client and family advisors.

Procedure

1. Service Area Engagement of Clients, Families and Public

- 1.1 At the beginning of and throughout the stages of change, development, and implementation of health care service design or redesign for improvements, the service area staff lead will identify plans to engage key stakeholders, especially the clients, patients, residents, families, and public.
- 1.2 Design/redesign planning will include the ways the service area lead will engage and seek to support diversity in the engagement practice(s), for representation of the population seeking or accessing the services.
- 1.3 Service area staff lead will build in feedback loops to support the clients, patients, residents, families, and public awareness for how their input is used and what changes were or plan to be made. (e.g., newsletter, Public Service Announcement (PSA), Annual General Meeting (AGM), engagement of Client Relations, care planning documents, rounds).

2. Service Area Engagement specific to Client & Family Advisors

- 2.1 A service area seeking to engage new client(s) and family advisor(s) will contact the CFCC Manager to establish a recruitment strategy and be supported in the steps outlined for [Meaningful Engagement, Onboarding and Exiting Process Map](#).
- 2.2 The service area will contact CFCC Manager to identify training resources for staff to support engagement, e.g., completion of online CFCC courses.
- 2.3 The CFCC Manager, with experienced advisors, will provide general orientation to new advisors to support understanding their advisor role.
- 2.4 Service area lead will identify the outcome(s) expected for the engagement activities and draft an action plan and/or Terms of Reference (TOR) for advisory councils and/or longer-term activities (e.g., process improvement initiative). Action plan and TOR will be finalized in partnership with client and family advisor(s).
- 2.5 Service area lead will provide specific service area orientation and information necessary to assist the advisor(s) prior to the start of the advisory role.
- 2.6 Service area lead will build in feedback loops to:

- Inform clients and family advisors of how their input is used and what changes can and will be made.
- Identify immediate, short-, and long-term action planning to support awareness of the impact of input.
- Identify where change is not able to be made and why (e.g., financial, space constraints).

3. Financial support provided by Eastern Health to client and family advisors

3.1 Service area leads or a higher level of authority (e.g., Director) must:

- pre-approve expenses for an advisory council or engagement activity,
- submit original receipts to Accounts Payable for reimbursement at the applicable current government rates.
<https://www.gov.nl.ca/exec/tbs/working-with-us/transportation/>
- make a direct payment, where possible, on behalf of the advisor by Eastern Health or facilitate arrangements with an external sponsoring agency/organization covering costs for conferences, hotels, flights, to reduce the out-of-pocket expenses and required reimbursement of an advisor(s).

4. Evaluation of advisor engagement practices

- 4.1 The CFCC Manager, with support from the Privacy, Planning and Performance Department, will implement an annual evaluation tool to assess the meaningfulness of the advisor role. Results will be shared with executive, leadership, staff, advisors, and the public, to support continued success and improvement with responsive action planning.
- 4.2 Service area lead completes an Advisory Council Engagement Update form annually for their advisory council and submits this to the CFCC Manager.
- 4.3 Service area lead completes a Project/Initiative Engagement Update form at the end of an improvement project/initiative for short term activities, or annually if the project/initiative work is longer term.
- 4.4 Advisors complete and submit a Client and Family Advisor Quarterly Engagement Update form to the CFCC Manager.
- 4.5 The CFCC Manager completes an annual organizational engagement report, using the completed Advisory Council Engagement Update, Project/Initiative Engagement Update and the Client and Family Advisor Quarterly Engagement Update forms to provide an organizational summary of engagement activities and plans. This report is shared internally and externally to support awareness of how advisor

engagement and feedback was used to make a difference with Eastern Health services.

- 4.6 All completed reports are shared with the PCC/CFCC Steering Committee to support CFCC development and action planning.

Guideline

Client and Family Engagement will include considerations for, but is not limited to, the following types of engagement:

- Seeking and or using direct feedback from clients, family or public while seeking or accessing services. (e.g., Bedside, care & discharge, rounds).
- The use of surveys (consult with Privacy, Planning and Performance Department to seek guidance in survey development and implementation).
- Focus groups, where clients, family, public are engaged to provide feedback.
- Client Relations and CSRS feedback/data to support service and experience of care improvements.
- Engagement of the public through community advisory councils, or public consultation groups (consult with Public Health, Eastern Health)
- Engagement of formal volunteer client and family advisors.

Advisors are engaged in activities they identify as meaningful to them. Discussion will take place with advisors to identify interest and ability to commit to engagement requests by the service area lead and/or the CFCC Manager.

Feedback loops assist in supporting meaningful engagement of client and family advisors and include but are not limited to:

- sharing the final policy or information brochure with advisors engaged in providing feedback,
- sharing a summary of advisor feedback, and identifying what has changed because of the feedback,

identifying service changes that have been made as a result of client feedback received from client relations, surveys, and more direct firsthand accounts of client and family experience stories shared.

Supporting Documents *(References, Industry Best Practice, Legislation, etc.)*

- Health Services Organization (HSO) Terms and Definitions, HSO 0400:2018 (E)

- HSO, Patient- vs People-Centred care: What's the difference? , January 12, 2020 <https://healthstandards.org/general-updates/people-vs-patient-centred-care-whats-difference/>
- Institute for Patient- and Family -Centered Care <https://www.ipfcc.org/about/pfcc.html>
- Partnering with Patients and Families to Design a Patient- and Family-Centered Health Care System: Recommendations and Promising Practices. <http://www.ihl.org/resources/Pages/Publications/PartneringwithPatientsandFamiliesRecommendationsPromisingPractices.aspx>
- Better Together Campaign Resources. Canadian Foundation for Healthcare Improvement. HealthCare Excellence Canada <https://www.cfhi-fcass.ca/innovations-tools-resources/item-detail/2020/05/20/better-together-change-package>
- Ontario's Patient Engagement Framework: Creating a strong culture of patient engagement to support high quality health care. <https://www.hqontario.ca/Portals/0/documents/pe/ontario-patient-engagement-framework-en.pdf>
- Newfoundland and Labrador, Provincial Government Public Engagement Guide <https://www.gov.nl.ca/pep/files/Public-Engagement-Guide.pdf>
- Vancouver Coastal Health's (VCH) Guidelines for Honoraria and Patient and Public Advisors—August 2017.
- World Health Organization, "Framework on integrated, people-centred health services", accessed August 27, 2019, at http://apps.who.int/gb/ebwha/pdf_files/WHA69/A69_39-en.pdf?ua=1&ua=1
- Government of Newfoundland and Labrador Transportation Policy Treasury Board <https://www.gov.nl.ca/exec/tbs/working-with-us/transportation/>

Linkages

- VOL-RSP-100 Volunteer Recruitment, Selection and Placement
- ADM-030 Privacy and Confidentiality
- 275CS-YTC-640 Family Engagement

Key Words

engagement, client and family advisor, advisor, CFCC, Client- and Family-Centred Care, volunteer, reimbursement, partner, partnership, partnership activity, council, advisory council, process improvement, PCC, people centred care, project, patient, patient and family, patient and family centred care, resident, resident, and family

Definitions & Acronyms

Client	The recipient of care. May also be called patient, consumer, individual or resident. Depending on the context, client may also include the client's family and/or support network when desired by the client. Where the organization does not provide services directly to individuals, the client refers to the community or population that is serviced by the organization. (HSO, 2019)
People-Centred Care	Defined by the World Health Organization as, "an approach to care that consciously adopts individuals', carers', families', communities' and health care professionals' perspectives as participants in, and beneficiaries of, trusted health systems that are organized around the comprehensive needs of people [...] People-centred care also requires that patients have the education and support they need to make decisions and participate in their own care and that health care professionals are able to attain maximal function within a supportive working environment. People-centred care is broader than person and patient/client and family-centred care, encompassing not only clinical encounters but also including attention to the health of people in their communities and their crucial role in shaping health policy and health services".
Client- and Family- Centred Care (CFCC)	A philosophy of care that guides all aspects of planning, developing, delivering, and evaluating services. It includes working collaboratively with clients and their families; providing care that is respectful, compassionate, culturally safe, and competent; and being responsive to needs, values, and culture (also referred to as patient/resident and family centred care).
Client and Family Engagement	Client, patient, resident, and family involvement as partners to shape healthcare services, at various levels across the healthcare system, e.g., direct client/family feedback at the bedside, public town halls, website information, or by formal engagement of client and family advisors). Client engagement is the involvement of clients in decision-making and active participation in a range of activities (e.g.,

	<p>planning, evaluation, care, research, training, and recruitment). Clients are valued as “lived experience experts” and are encouraged to work in collaboration with, and as equal partners to, professionals (Tambuyzer, Pieters & Van Audenhove, 2017)</p>
Client and Family Advisor	<p>Formal role of a client and/or family, who are officially onboarded, via Eastern Health Volunteer Resources. Advisors work with the organization and often individual care teams. They may be involved in planning and service design, recruitment, and orientation, working with clients directly, and gathering feedback from clients and team members. Partnering with clients enables the organization to advance a people-centred care approach (HSO0400 2018). Advisors partner with staff and physicians to help improve the quality of care for all and can be members of advisory councils, and/or quality committees, for example. (Terms also used are resident and family advisor or patient and family advisor or patient partner, depending on the type of service/program area.)</p>
Feedback Loop(s)	<p>Communication process for sharing with client and family advisor(s) how the feedback/input they provided made an impact. Some examples include identifying how suggestions for improvement resulted in changes being made; arranging for an advisor to see a new or improved physical space where they had a part in supporting the design/re-design; sharing evaluation results for services that advisors partnered with to improve.</p>
Meaningful Engagement	<p>Provide a welcoming environment, outline clear and appropriate expectations of the engagement practice, and expected outcomes, support clients and family members in their role so they can participate fully, and ensure feedback loops are established and completed.</p>
People Centred Care (PCC)	<p>Care that is focused and organized around the health needs and expectations of people and communities rather than on diseases. People-centred care extends the concept of patient/client-centred care to individuals, families, communities and society. Whereas patient-centred care is commonly understood as focusing on the individual seeking</p>

	<p>care — the patient — people-centred care encompasses these clinical encounters and also includes attention to the health of people in their communities and their crucial role in shaping health policy and health services. Source: Health Standards Organization (HSO) adopted definition from World Health Organization (WHO). Patient- vs People-Centred Care: What's the difference? - HSO Health Standards Organization</p>
Reimbursement	<p>Repayment for out-of-pocket expenses related to engagement in an activity, for example, travel costs. This would be set at government rates.</p>
Service Area Lead	<p>Refers to staff/physician lead, from a particular program/service or department, who is responsible for an engagement activity. E.g., This may be a program coordinator, manager, director, physician or a designate carrying out the responsibilities of a service area lead.</p>