

# Patient and Staff Engagement in Health System Improvement: A Qualitative Evaluation of the Experience-Based Co-Design Approach in Canada

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**TABLE 3.**  
**Participant Characteristics**

| EBCD stage                                         | Key enablers                              | Key barriers             | Tips                                                                                                                                                                                                                                                                                                                                                                                                                     |
|----------------------------------------------------|-------------------------------------------|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| All stages                                         | Human resources<br>Time                   | Human resources<br>Time  | <ul style="list-style-type: none"> <li>Adequate planning is needed to acquire necessary human resources and time, because these were identified as both key facilitators and enablers at all stages</li> </ul>                                                                                                                                                                                                           |
| Establishing a project team                        | Patient/caregiver engagement              |                          | <ul style="list-style-type: none"> <li>Secure support from senior leadership</li> <li>Secure time to recruit and establish the project team; set up regular meetings</li> </ul>                                                                                                                                                                                                                                          |
| Developing a project plan                          | Stakeholder/executive engagement          |                          | <ul style="list-style-type: none"> <li>Engage appropriate stakeholders in the plan development (e.g., include patient and staff feedback and approval)</li> </ul>                                                                                                                                                                                                                                                        |
| Setting up information sessions                    | Financial resources<br>Physical resources |                          | <ul style="list-style-type: none"> <li>Widely share the EBCD philosophy and project plan to raise awareness and recruit participants (e.g., at staff meetings, operational leadership meetings, information tables, posters, etc.)</li> <li>Distribute information in a quick and timely manner to keep momentum</li> <li>Avoid “difficult” periods for communication and engagement (i.e., summer, holidays)</li> </ul> |
| Recruiting patients, caregivers and family members | Patient/carer engagement                  | Patient/carer engagement | <ul style="list-style-type: none"> <li>Having patients and carers engaged in this stage can be very helpful</li> <li>Recruitment may be difficult try a variety of strategies</li> <li>This phase may take longer than expected</li> </ul>                                                                                                                                                                               |

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| EBCD stage                        | Key enablers                                                                                              | Key barriers             | Tips                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Recruiting staff                  |                                                                                                           |                          | <ul style="list-style-type: none"> <li>Ensure protected time to recruit staff, have one-on-one discussions, etc.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Observation sessions              |                                                                                                           |                          | <ul style="list-style-type: none"> <li>Ensure adequate time is allocated. This stage can take longer than anticipated</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Surveys                           | Patient engagement                                                                                        |                          | <ul style="list-style-type: none"> <li>Ensure adequate time is allocated. This stage can take longer than anticipated</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Interviews/Videos                 | Financial resources<br>Physical resources<br>Patient/carer engagement<br>Stakeholder/executive engagement | Physical resources       | <ul style="list-style-type: none"> <li>Engage both stakeholders/executives and patients/carers</li> <li>Having someone on staff who has experience conducting interviews is helpful</li> <li>The interview process can be challenging, in terms of securing the equipment and the film editing</li> <li>Consider privacy and risk issues when sharing videos with patients and families</li> <li>Consider finding a pleasing (i.e., free of distractions, warm, inviting, comfortable, etc.) place for interviews</li> <li>Research and practice interview techniques</li> </ul> |
| Co-design event                   | Financial resources<br>Physical resources<br>Stakeholder/executive engagement<br>Patient/carer engagement |                          | <ul style="list-style-type: none"> <li>Secure financial, human, time and physical resources early on in the process</li> <li>Engage stakeholders, patients, families, and caregivers</li> <li>Consider holding meetings off-site to provide a neutral/safe environment for discussion</li> </ul>                                                                                                                                                                                                                                                                                 |
| Emotional map/ touch points       |                                                                                                           |                          | <ul style="list-style-type: none"> <li>Schedule meetings at times convenient for the patients, families and caregivers</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Patient/carer feedback            | Patient/carer engagement                                                                                  | Patient/carer engagement | <ul style="list-style-type: none"> <li>Engage patients and families</li> <li>Schedule meetings at times convenient for the patients and caregivers</li> <li>Consider communication via email because some patients and caregivers may not be able to attend every session</li> </ul>                                                                                                                                                                                                                                                                                             |
| Staff feedback meeting            | Stakeholder/executive engagement                                                                          |                          | <ul style="list-style-type: none"> <li>Consider scheduling meetings during the work day, try to accommodate staff schedules</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Reviewing findings/creating tasks | Financial resources, stakeholder and patient engagement                                                   |                          | <ul style="list-style-type: none"> <li>Hold an appropriate number of meetings to allow time to identify priorities and develop the teams that would work on the solutions</li> <li>Ensure that individuals are not burdened with too many tasks</li> </ul>                                                                                                                                                                                                                                                                                                                       |

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| EBCD stage                    | Key enablers        | Key barriers | Tips                                                                                                                                                                                                                                                                                   |
|-------------------------------|---------------------|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Implementing findings/changes | Financial resources |              | <ul style="list-style-type: none"> <li>• If patients are not involved, ensure that staff implement changes with continuous feedback from patients and caregivers</li> <li>• Hold a celebration party if possible</li> </ul>                                                            |
| Evaluation findings/changes   | Financial resources |              | <ul style="list-style-type: none"> <li>• Evaluate the initial feedback and continue to monitor the process as minor adjustments are made</li> <li>• Share improvements/changes highlighting patient, families, caregivers engagement (e.g., via posters in the institution)</li> </ul> |