

PATIENT PARTNER RECRUITMENT WORKSHEET



Key Components

Determine Structure

Big picture: How will we incorporate patient partners for QI?

(Include patient partners in regular QI meetings? Hold bi-annual events? Create a patient advisory board?)

Determine Patient Role

Will patient partners be asked to review patient-facing materials, provide personal stories, fill in context to make sense of data?

Determine Compensation

How will we compensate patients for their time, emotional load, and context expertise?

Consider offering a gift card, public acknowledgement, covering the cost of Momma's Voices training, etc

Details

How often will we engage patient partners?
In what setting?
Are meeting times and locations accessible to patient partners?

Do we need permission from senior leadership?
Is there an existing/historical structure or a template we can follow?

How many patients would we ideally engage at one time?

What will be our ask?

What types of actions or activities will we ask patient partners to complete?

What will we offer patient partners in terms of compensation?

What requirements must patient partners meet in order to be compensated? (e.g. attend $\frac{3}{4}$ meetings)

Action Steps/Person Responsible

By _____,
_____ will:

By _____,
_____ will:

By _____,
_____ will:

Key Components

Application Process

How will patients apply? (via online survey, posters with email contact, personal referral, etc.)

What eligibility criteria will we use? (must have received care at our hospital, preferred background, identities or experiences including complications or unexpected outcomes)

Candidate Selection

How will your team review applications and determine patient partners?

Onboarding

How will you provide orientation to patient partners?

Details

How to apply:

Requirements:

Deadline to apply:

Who will review applications and make selections?
Preferably 2+ staff will do this together.

How quickly will you get back to applicants? How will you reply to those not selected?

What paperwork will patient partners need to complete?

Will you have a meeting with patient partners before bringing them into larger staff meetings?
Will you give them a tour?

How will you educate your staff about patient partner engagement?

Action Steps/Person Responsible

By _____,
_____ will:

By _____,
_____ will:

By _____,
_____ will:

Key Components

Quality Assurance

How will you ensure patient partners are welcomed, given a voice, and treated respectfully?

Details

How (& how often) will you check in with patient partners regarding their engagement experience?

How will you follow up with any concerns raised by patient or staff?

Action Steps/Person Responsible

By _____,
_____ will:

Quality Improvement

What will you do with the insights gained?

How will you inform patient partners about how their insights were used to make changes?

How will you debrief and synthesize insights and anecdotes?

How will insights be used to drive QI?

By _____,
_____ will:

• Notes: