



# Supporting high-quality public and patient engagement in the Canadian health system

## Introducing the Public and Patient Engagement Evaluation Tool (PPEET)

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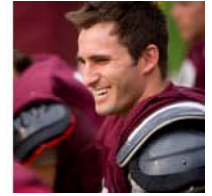
# Background

- Public and patient engagement (PPE) practice in Canada has evolved considerably over the last decade
- Evaluation has lagged behind
  - rich tradition of case studies
  - fewer efforts to assess ‘what works’ and with ‘what impact’
  - existing evaluation frameworks and tools not well aligned with engagement practitioners’ needs



# Recent developments

- Growing emphasis on PPE
  - health research
  - quality improvement and patient safety
  - health system planning and decision making
- Many more evaluation opportunities and reporting requirements
- Convergence around principles of ‘quality engagement’



# The Public and Patient Engagement Research-Practice Collaborative





## Who we are

- Pan-Canadian partnership of engagement practitioners and researchers (est. in 2011)
  - 7 provinces (6 health authorities and 1 provincial health council)
- Supported by a series of CIHR grants





# Our goal

To develop a common evaluation tool for use across a wide range of organizations with the aim of building a body of evidence to inform organizational practice and policy related to public and patient engagement



# Tool Development Process

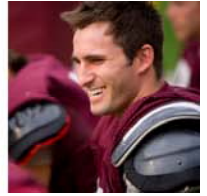
- Iterative, collaborative and consensus-based to ensure relevance, acceptability and uptake in a wide range of organizations
- Three discrete phases:
  - Literature review (published & grey)
  - Tool development (modified Delphi process)
  - Usability testing (2 health regions; 250 questionnaires across three user groups)



# Overview of the tool

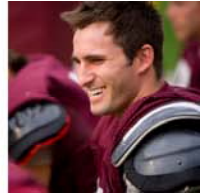
- Three questionnaires aimed at 3 discrete levels of practice and respondent groups
  - Participant questionnaire
    - Patient/citizen/user participants in various engagement activities and roles
  - Project questionnaire
    - Staff responsible for engagement activities
  - Organization questionnaire
    - Leadership responsible for developing capacity for and culture of PPE within the organization





## Tool dimensions and structure

- Principles of ‘quality’ PPE (from literature)
  - Integrity of design and process
  - Impact and influence
  - Participatory culture
  - Collaboration and common purpose
- Multiple outcome measures for each principle
- Closed- and open-ended response categories (agree-disagree + open comments)



# Participant Evaluation

- Participant assessments of key features of engagement activity + perceptions of impact
- Administered to a broad range of participants in one-time or on-going engagement activities
- Optional set of demographic questions



# Public and Patient Engagement Evaluation Tool (PPEET)

## Participant Evaluation Questionnaire

**TITLE OF ENGAGEMENT ACTIVITY:** \_\_\_\_\_

**INSTRUCTIONS:**

- We are interested in your feedback about the engagement activity that you recently participated in [optional: insert description and objectives of engagement activity as a memory prompt for respondents]
- The questionnaire is composed of several statements. Please indicate your level of agreement with each statement and check only one box for each statement.
- Please provide additional feedback in the comment boxes provided throughout the questionnaire.
- All information you provide will remain confidential.
- Thank you very much for your participation!

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
The purpose of the activity was clearly explained.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The supports I needed to participate were available (e.g., travel, child care, etc).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I had enough information to contribute to the topic being discussed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was able to express my views freely.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I feel that my views were heard.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A wide range of views on the topic was expressed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I feel that the input provided through this activity will be considered by the organizers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The activity achieved its stated objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I understand how the input from this activity will be used.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I think this activity will make a difference.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
As a result of my participation in this activity, I am better informed about [administering organization to insert relevant term here, e.g., PPE issue, organization, health system, other topic of focus].	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



# Project Evaluation

- Assesses the planning, execution and impact of the engagement activities
  - procedurally quality + impact (e.g., results shared, considered or used in decision making)
- Completed by those most directly involved in the engagement activity (+ external partners)



## Public and Patient Engagement Evaluation Tool (PPEET) Project Evaluation Questionnaire

### B. Influence and Impact

	Yes	No	Don't know	Comments
Members of the organization's leadership received a summary report of the PPE input (e.g., program manager, senior management).				
The results of the PPE activity were shared directly with the senior leadership or the Board (through presentations or consultations).				
Members of the organization's leadership considered the PPE input.				
Members of the organization's leadership used the PPE input to influence decisions related to health care improvement.				



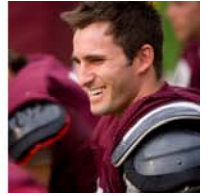


# Organization Evaluation

- Assesses the organizational policies and culture of PPE over time
- Aimed at senior leadership (Board members, executive team, managers, senior project leads)

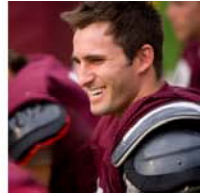
**Public and Patient Engagement Evaluation Tool  
(PPEET)  
Organization Questionnaire**

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
A commitment to PPE values and principles is found in key organizational documents (e.g., mission and vision, strategy, etc.).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A commitment to PPE values and principles is demonstrated through the structure of the organization (e.g., dedicated PE leadership positions).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organization actively participates with provincial/national/international PPE organizations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PPE is articulated in job descriptions for staff who are leading and supporting these activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comprehensive PPE training and materials are available to support staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have adequate training in PPE to support me in my role.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



## Various applications of the tool

- To inform current PPE practices
- To inform organizational policy review of PPE
- To guide the development of new PPE policy and practice
- As an accountability tool



## Current status of our work

- Peer-reviewed publication forthcoming in *Health Expectations*
- Public launch in June – watch for this at <http://fhs.mcmaster.ca/...> or [abelsonj@mcmaster.ca](mailto:abelsonj@mcmaster.ca)
- Evaluation questionnaires ready for use and further testing
- Interest in future research-practice collaborations



# Final reflections

- Science of public and patient engagement is at a nascent stage of development
- Promising developments (e.g., conceptual advances; synthesis of key learnings from different fields)
- Current focus on PPE provides opportunity for progress
- Research that will make a difference in this area requires:
  - a carefully constructed research agenda
  - strong conceptual foundation and methods expertise
  - collaborative relationships with health system and patient partners
  - recognition of political and moral imperatives associated with the engagement movement