

Creating Engagement Capable Environments in Ontario Health Teams: A Framework for Action

June 2023



About the Framework

Patient engagement and partnership is a key building block for patient-centred health systems and has been a priority for Ontario Health Teams (OHTs) since their establishment in 2019. Through meaningful engagement and partnering, OHTs ensure that their work is centred around the needs and values of patients, families and caregivers, and the communities they serve. Engagement capable OHTs recognize the value of engagement, understand how to effectively partner with patients, families and caregivers, and work to build and sustain a culture where patient, family and caregiver (PFC) engagement is central to achieving their goals.

This framework outlines the competencies, supports and enablers needed to build engagement capable OHTs. Each of the competencies, support and enabler domains includes a number of sub-domains and resources to help OHTs build these.

Competency Domains:

1. Understanding Ontario Health Team roles and functions
 2. Recognizing the value of patient, family and caregiver engagement and partnering
 3. Employing effective engagement practices
 4. Integrating equity, diversity and inclusion principles and practices
 5. Developing personal characteristics
 6. Communicating with respect, empathy and transparency
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Support and Enabler Domains:

1. Policies and strategies
 2. Structures and processes
 3. Capacity
 4. Development, learning and exchange
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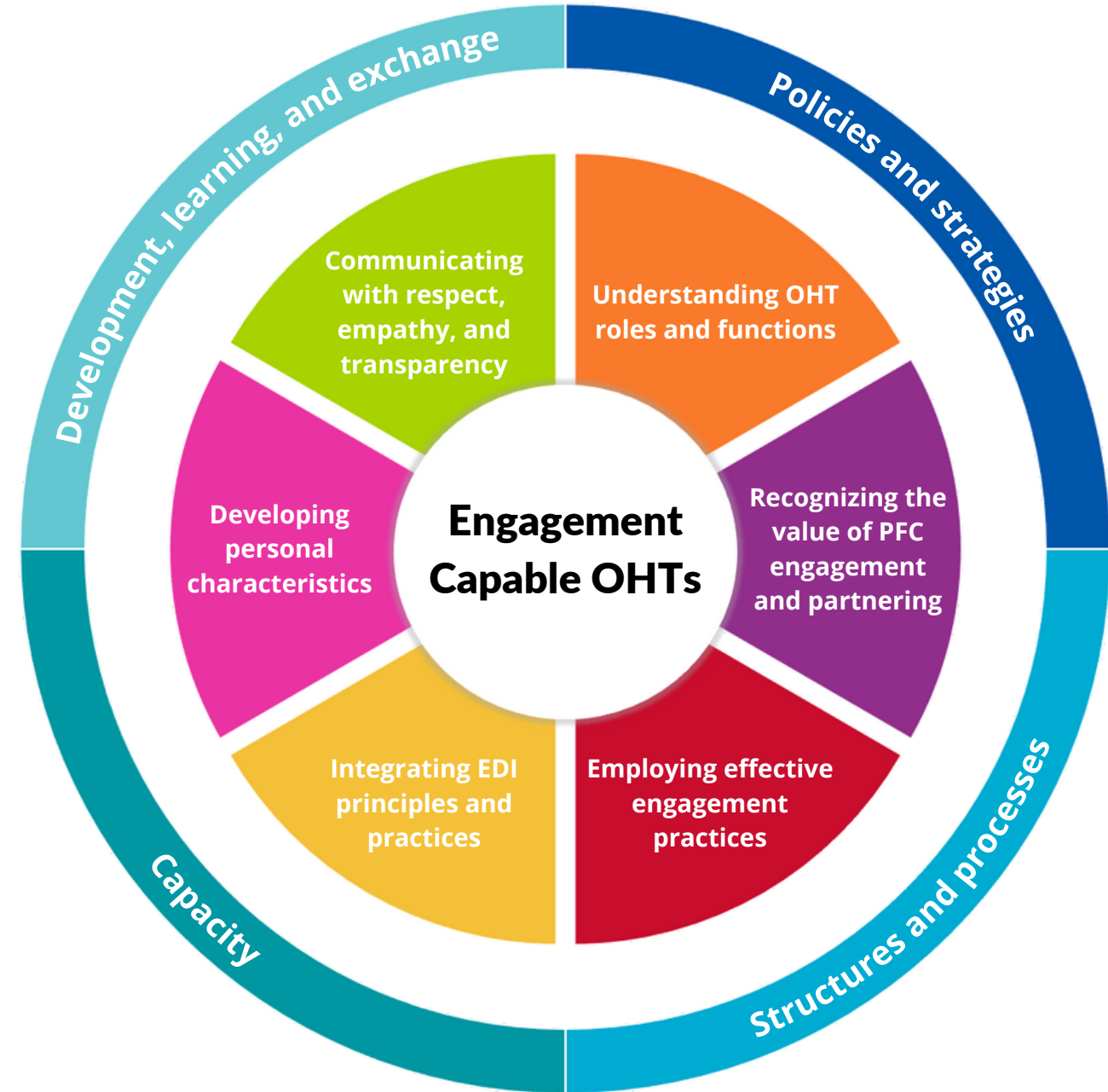
Maturity Stages:

1. Building the foundation
 2. Learning and developing
 3. Sustaining and evolving
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Competencies, supports and enablers

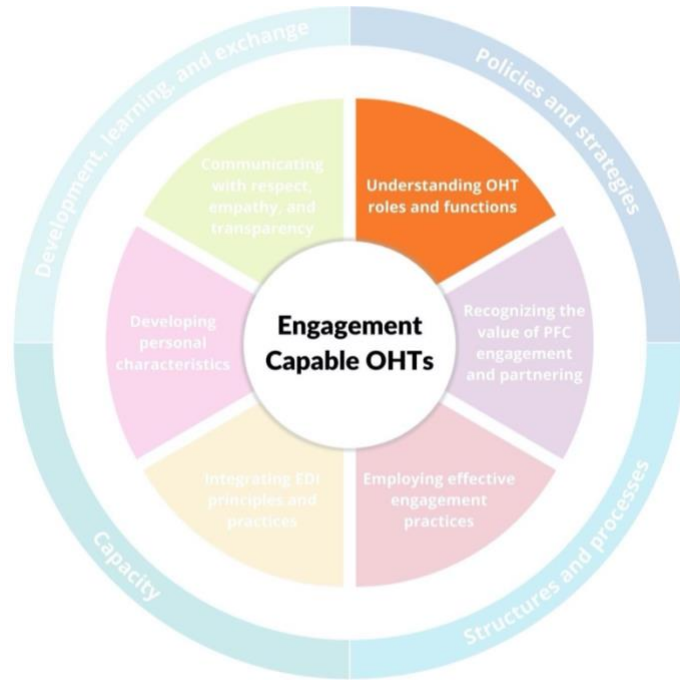
There are 6 competency and 4 support and enabler domains that comprise the engagement capable OHT framework (presented here and in the following sections). Competencies are the essential knowledge, skills, attitudes and beliefs that are necessary to be successful within a certain field, in this case, for patient, family and caregiver engagement and partnering. Supports and enablers provide the infrastructure that fosters the competency development required to build and sustain engagement capable OHTs.

For each of the competencies, supports and enablers, we have included key resources. Lack of experience or knowledge in any of these competency areas should not exclude individuals from partnering with OHTs or serve as barriers to participation.



Competency Domains

The **six competency domains** described below outline the key competencies required for OHT staff, leadership and PFC partners to successfully work together to create engagement capable OHTs. These are not intended as a checklist of items that all individuals working with OHTs must possess. Think of these competencies as building blocks – those working with and in OHTs build and develop competencies over time as they mature in their ability to successfully engage and partner. OHTs should have these competencies represented across their teams, but individuals may not have each competency themselves.



1. **Understanding OHT roles and functions in relation to health and social services systems**

OHT leadership, staff and patient, family and caregiver partners...

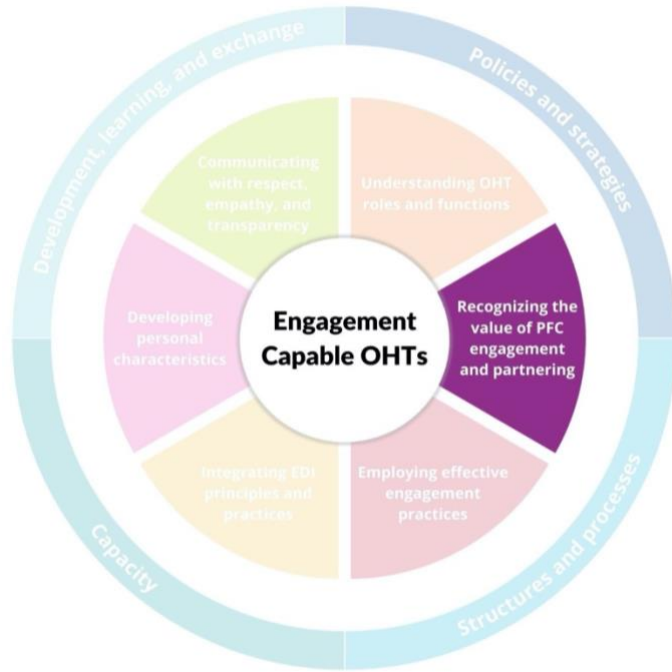
- Understand what an Ontario Health Team is, including its structure, function, and purpose
 - Understand the roles of all members of the OHT, including PFC partners
- Understand the OHT community including the groups that make up the OHT's attributed population, the challenges faced by the community and the supports that are needed
- Understand the basic structure and funding arrangements of health and social services systems provincially and at their local OHT level
 - Understand the challenges facing these systems and how these impact the work of the OHT
- Understand the process of system transformation, including the time required, and the opportunities for change to be made at the OHT level
- Recognize that some groups may have limited understanding of these systems beyond their own experiences, and may need additional support to build this knowledge

Key Resources:

[Ontario Health Teams: The Path Forward Webinar Recording and Resource](#) (Ministry of Health, 2022)

[Ontario Health Teams: Guidance for Health Care Providers and Organizations](#) (Ministry of Health, Guidance, 2019)

[Understanding health care in Ontario](#) (Ministry of Health, Website)



2. *Recognizing the value of PFC engagement and partnering*

OHT leadership, staff and patient, family and caregiver partners ...

- Understand the centrality of PFC partners' perspectives to patient-centred health systems
- Demonstrate commitment and passion for PFC engagement
- Understand what PFC partners bring to their roles, both in terms of their experiences with the health system, and the skills and knowledge they have outside of these experiences
- Demonstrate openness to understanding, and sensitivity to, the experiences, stories and perspectives of patients, families and caregivers
- Appreciate, recognize and celebrate the contributions and successes of PFC partners

Key Resources:

[A foundation of patient engagement: Improving health care through partnerships](#) (Patient Voices Network, Webinar recording, 2022)

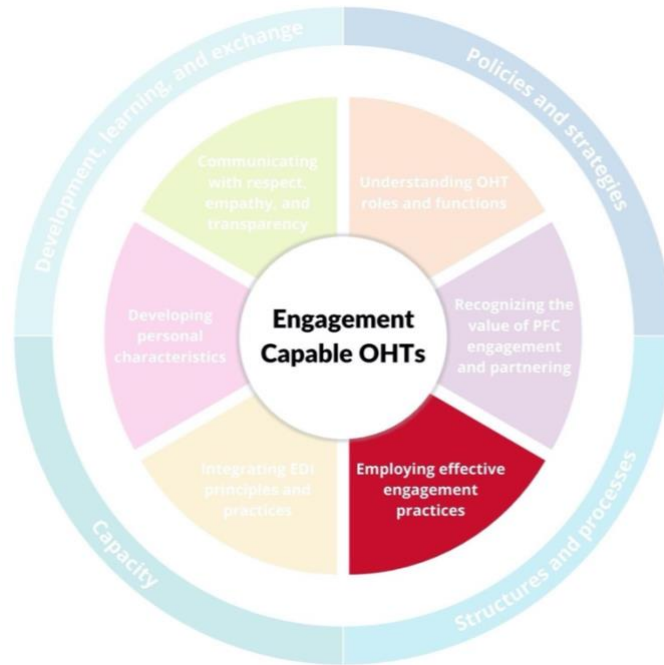
[Authentic and meaningful engagement: The caregiver perspective](#) (Ontario Caregiver Organization, Webinar, 2021)

[Partnering with the community: What is my role?](#) (Algoma OHT, Fact sheet)

[Participating on a committee: A resource for Patient & Family Advisors](#) (Ontario Health, Resource)

[Engaging Patient & Family Advisors on Committees](#) (Ontario Health, Resource)

3. Employing effective PFC partnership and engagement practices



OHT leadership, staff and patient, family and caregiver partners...

- Understand the meaning of partnership and engagement in the OHT context and the different forms this can take (e.g., sharing personal journeys, consultation and advisory roles, collaboration and co-design, governance)
- Understand the principles and approaches required to foster safe and respectful engagement and partnering (i.e., psychological safety, recovery-oriented approaches, trauma informed principles)
- Understand the key requirements for effective partnership and engagement which include:
 - Choosing engagement approaches that align with project goals and scope, and that are appropriate and acceptable for the communities OHTs are seeking to engage with
 - Making partnership and engagement accessible and inclusive for a variety of PFCs and recognizing when wider engagement is needed
 - Purposefully recruiting PFC partners, and retaining them in their roles through orientation and adequate supports to prevent burnout
 - Recognizing and acting on PFC partner feedback and input, and systematically and transparently sharing the outputs of work with PFC partners
 - Allocating sufficient time and resources to ensure authentic partnership and engagement
- Understand the role for evaluating PFC engagement and partnering as part of a learning and improvement culture:
 - Having a basic understanding of the different purposes for evaluation (e.g., continuous learning and improvement, measuring impact)
 - Having a working knowledge of the evaluation tools available to support this work and how to develop and execute an engagement evaluation plan for the organization

Resources:

Topic: Frameworks and strategies

[Ontario's Patient Engagement Framework](#) (Health Quality Ontario, Framework, 2017)

[Patient, Family and Caregiver Partnership and Engagement Strategy: Guidance Document](#) (Ministry of Health, Guidance document, 2021)

Topic: PFC engagement methods and strategies

[15 ways to support the meaningful engagement of caregivers, patients, and families](#) (Ontario Caregiver Organization, Fact Sheet)

[Best Practices for Virtual Patient Engagement](#) (Saskatchewan Centre for Patient-Oriented Research, Infographic)

[Choosing meaningful projects](#) (Health Quality Ontario, Resource)

[Choosing Methods for Patient and Caregiver Engagement: A guide for Health Care Organizations](#) (Health Quality Ontario, Resource)

[Engaging Patient and Family Advisors on Committees](#) and [Participating on a Committee: A guide for Patient and Family Advisors](#) (Ontario Health, Guide)

[OHT Engagement Learning Series: Engagement Methods](#) (Trillium Health Partners Institute for Better Health, Webinar, 2023)

[Supporting and engaging caregivers in Ontario Health Teams](#) (Ontario Caregiver Organization, Webinar, 2021)

[Take your patient partnering to the next level](#) (Health Quality Ontario, Resource, 2019)

Topic: Follow-up and sharing with PFC partners

[Closing the loop resources](#) (Patient Voices Network, Resources and Template)

[Closing the loop e-mail templates](#) (Health Quality Ontario, Template)

Topic: Evaluation

[Engage with Impact Toolkit](#) (Public and Patient Engagement Collaborative, Toolkit)

[Evaluating the Impact of Patient Partnering](#) (Ontario Health, Guide)

[OHT Impact Fellows – Lunch and learn series: Building evaluation capacity in Ontario Health Teams](#) (Impact Fellows Program, Webinar, 2023)

[Public and Patient Engagement Evaluation Tool \(PPEET\)](#) (Public and Patient Engagement Collaborative – McMaster University, Tool)

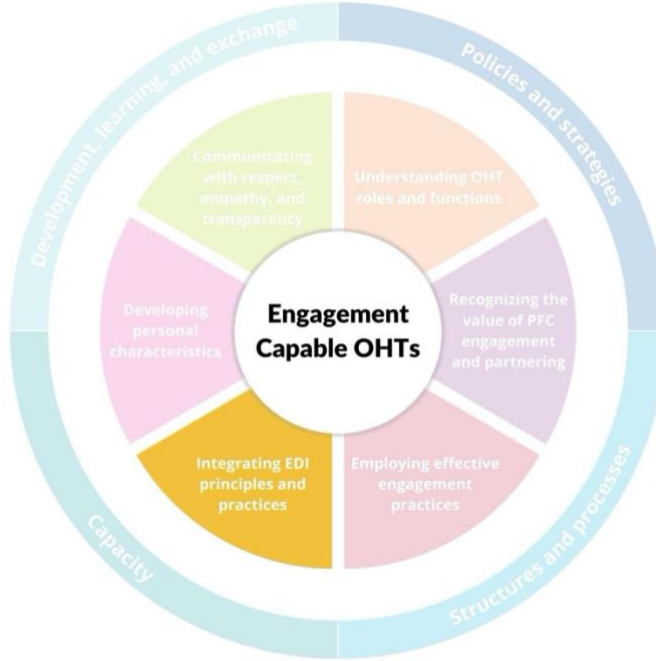
[Staff evaluation of community partnership](#) (Algoma OHT, Tool)

[OHT Engagement Learning Series: Evaluating your engagement activities](#) (Trillium Health Partners Institute for Better Health, Webinar, 2023)

4. *Integrating Equity, Diversity, Inclusion (EDI) principles and practices into all engagement and partnering work*

OHT leadership, staff and patient, family and caregiver partners...

- Understand the key concepts of EDI and how they relate to each other
- Understand related concepts to EDI such as culturally safe environments, cultural sensitivity, social determinants of health and health equity
- Are aware of and practice the principles of reconciliation and Indigenous cultural safety
- Understand how EDI principles may be applied differently across different communities and populations and work in ways that emphasize:
 - Understanding communities and populations facing significant barriers to engagement and/or mistrust of the health system (e.g., newcomers, individuals without OHIP coverage, lower socioeconomic backgrounds)
 - Using a wide range of engagement approaches and supports to facilitate participation from diverse groups with diverse needs (e.g., community meeting spaces, flexible meeting times, provision of child/elder care, compensation)
- Understanding accessibility requirements to ensure all can actively participate in engagement activities (e.g., accessible spaces, provision of materials in large text, interpretation)



Resources:

Topic: Equity, Diversity and Inclusion

[Diversity, equity and inclusion in patient engagement: What is it and why is it so important?](#) (Patient Voices Network, Webinar, 2022)

[Equity in Engagement Framework](#) (Ontario Health, Framework)

[OHT Engagement Learning Series: Equity, Diversity & Inclusion](#) (Trillium Health Partners Institute for Better Health, Webinar, 2023)

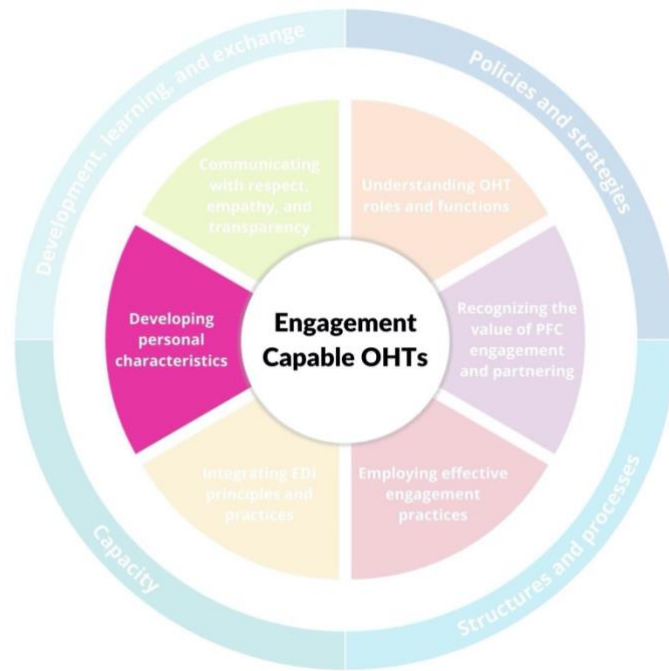
[Supporting Equity-Centred Engagement: A step-by-step guide with tailored resources](#) (Public and Patient Engagement Collaborative, Guide, 2023)

[Recruiting for diversity](#) (Health Quality Ontario, Report)

Topic: Engagement with Indigenous partners and communities

[Building inclusive and reciprocal relationships with Indigenous organizations and communities](#) (Indigenous Primary Health Care Council, Webinar, 2021)

[Culturally safe patient engagement: What matters to Indigenous patient partners and guide](#) (BC Patient Safety & Quality Council, 2021)



5. *Developing personal characteristics to enhance meaningful and authentic engagement*

OHT leadership, staff and patient, family and caregiver partners...

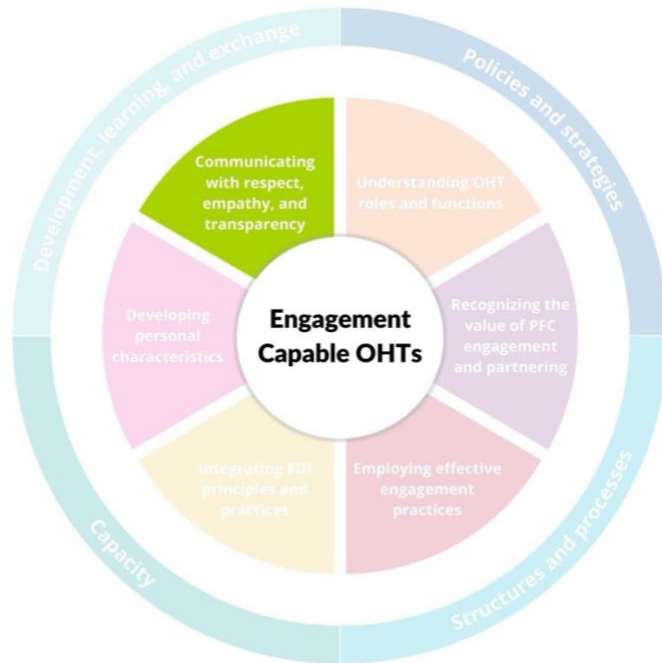
- Are aware of the personal characteristics that contribute to meaningful and authentic engagement including but not limited to:
 - Open and curious mindset to approach tasks with a sense of creativity and innovation
 - Openness to change, willingness and ability to adapt
 - Perseverance and patience (understanding that some processes may take longer than expected)
- Approach engagement activities with compassion and empathy
 - Treat others with respect and courtesy
 - Create trauma-informed, safe spaces
- Demonstrate awareness of personal/unconscious biases and actively work towards reducing/managing them
- Acquire and maintain general skills required to support engagement and partnering activities (critical thinking, advocacy, organizational/time management, technology)

Resources:

Topic: *Creating trauma-informed, safe spaces*

[A Trauma-Informed Approach to Engagement](#) (Centre for Healthcare Innovation, Webinar, 2021)

[Trauma-Informed: The Trauma Toolkit](#) (Klinic Community Health Centre, Toolkit, 2013)



6. *Communicating with respect, empathy, and transparency*

OHT leadership, staff and patient, family and caregiver partners...

- Use active listening skills in all interactions to promote mutual understanding
- Provide feedback in a respectful and constructive manner
- Use different language and communication styles to ensure cultural sensitivity and accessibility
 - Carefully use language to eliminate implicit biases and stigma
 - Use accessible language and provide supports to ensure all parties understand commonly used health care terms (e.g., acronyms)
- Communicate openly and transparently
- Effectively share lived experiences to inform system change and are supported to do so in a trauma-informed way

Resources:

Topic: Communication

[Compassionate language for mental health and substance use: Holding people in high regard](#) (Support House Centre for Innovation in Peer Support, Guide, 2022)

[OHT Engagement Learning Series: Communication, Compassion and Empathy](#) (Trillium Health Partners Institute for Better Health, Webinar, 2022)

[OHT Learning Series: Leaning into the Challenges](#) (Trillium Health Partners Institute for Better Health, Webinar, 2023)

[Tips for effective communication](#) (Patient Voices BC, Infographic)

[A glossary of health care terms: For patient and caregiver partners](#) (Ontario Health, Resource)

[Communicating clearly with patient and family advisors: A plain language checklist](#) (Ontario Health, Resource)

Topic: Sharing and hearing lived experiences

[Engaging in Storytelling, Part 1: “The patient story experience – cost or benefit?”](#) by SPORcast and [Engaging in Storytelling, Part 2: Organizations and Patient Stories](#) (Matters of Engagement, Podcast, 2020)

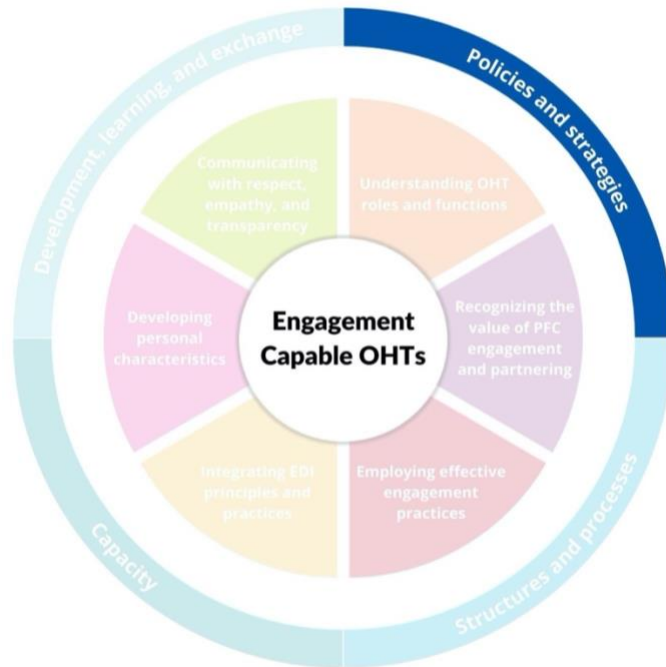
[OHT Engagement Learning Series: Bearing witness to lived experience and emotions](#) (Trillium Health Partners Institute for Better Health, Webinar, 2023)

[Patient Storytelling Toolkit](#) (Greater Hamilton Health Network, Toolkit, 2022)

[Sharing your story safely](#) (Mental Health Commission of Canada, Factsheet)

Support and Enabler Domains

The **four support and enabler domains** listed below provide the infrastructure that OHT leadership, staff and PFC partners need to work together in an environment that fosters respectful and effective engagement. Not all of these are under the direct control of OHTs and need to be developed in partnership with others (e.g., Ministry of Health, Ontario Health).



1. Policies and strategies

- OHT policies and strategies demonstrate a clear commitment to PFC engagement and its centrality to all OHT activities
- Policies and procedures to support PFC engagement and partnering are in place with clearly identified roles for OHT staff and PFC partners
- Foundational elements to support engagement are developed and implemented, including but not limited to:
 - PFC Declaration of Values
 - PFC Engagement and Partnership Strategy
 - PFC compensation policy/approach (local and provincial guidance)
 - Strategies for sharing engagement opportunities with PFC partners in a timely way that promotes equitable engagement
- Communication strategies to support PFC engagement and partnership are in place
 - All messaging from the OHT demonstrates the value placed on PFC partnership
 - Accessible language, spaces and approaches are used to promote diverse engagement

Resources:

[Ontario Health Teams: Patient, Family and Caregiver Partnership and Engagement Strategy](#) (Ministry of Health, Guidance, 2021)

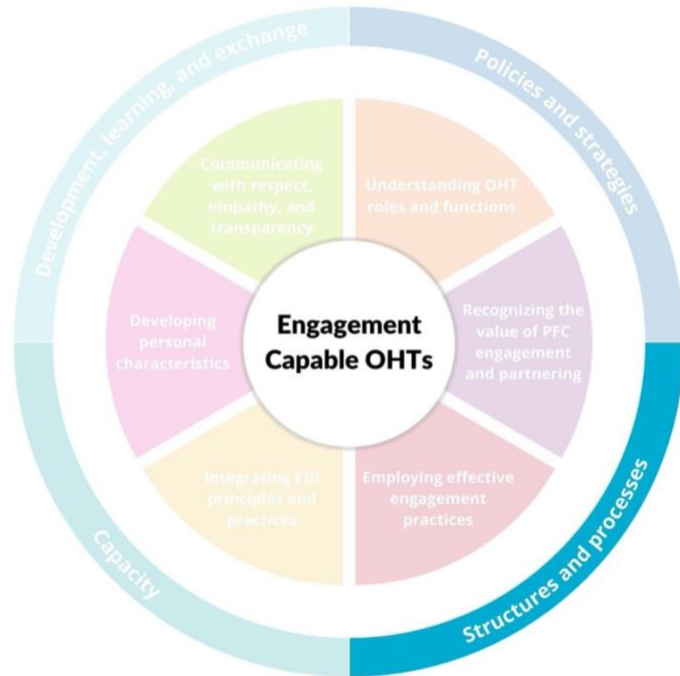
[OHT Virtual Engagement Series Webinar: Patient, Family and Caregiver Declaration of Values](#) (Ministry of Health, Webinar, 2021)

[Patient, Family and Caregiver Declaration of Values for Ontario](#) (Ministry of Health, Document, 2021)

Topic: Compensation

[7 things to think about when considering compensation for patient and family caregiver engagement](#) (Ontario Caregiver Organization, Fact sheet)

[Recommendations on patient engagement compensation](#) (SPOR Networks in Chronic Diseases and The PICHI Network, Guidance)



2. Structures and processes

- Engagement structures with clear goals and operational plans (e.g., PFAC) are in place
 - Inclusion of PFC partners at governance tables
 - Sufficient PFC partner representation to balance perspectives on OHT committees (minimum of 2 PFC partners)
- Supports for PFC partner roles and activities are developed and shared:
 - Clearly described recruitment strategies that aim to reach and connect with individuals from a wide range of backgrounds
 - OHT staff and PFC partners actively work to create a safe space for these individuals
 - Clear and consistent onboarding strategies for new PFC partners
 - Key background information about the OHT (e.g., functions, funding mechanisms)
 - Detailed role descriptions, including scope of activity/work, role expectations (e.g., advisory, decision making), time and length of commitment (hours/week, number of months)
- Procedures for directly supporting PFC partners are clearly described and transparently communicated:
 - Guidelines for compensating PFC partners and reimbursing expenses, developed in collaboration with PFC partners
 - Tools and supports to remove barriers to participation (e.g., technology to support participation)
 - PFC partners have a specific staff contact/liason within the OHT

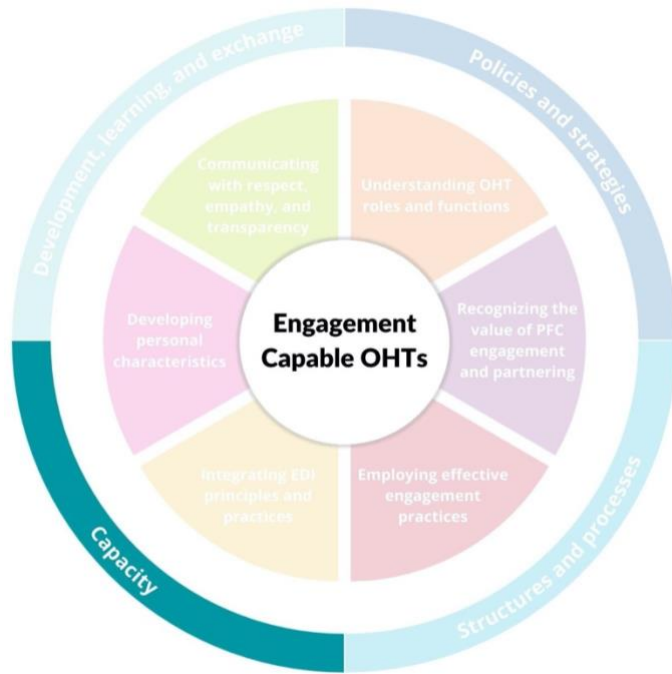
Resources:

[Creating an effective Terms of Reference](#) (Health Quality Ontario, Guide)

[Patient, Family and Caregiver Advisory Conflict of Interest Declaration and Agreement Template](#) (Ontario Health, Template)

[Sample PFAC Terms of Reference](#) (Algoma OHT, Template)

[Terms of Reference Template: Patient and Family Advisory Council](#) (Ontario Health, Template)



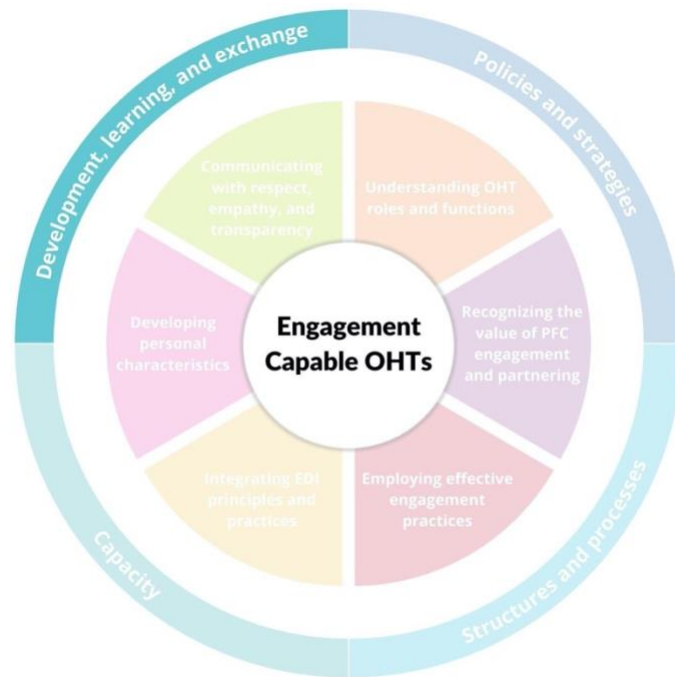
3. Capacity

- Strong OHT leadership with training in PFC engagement
- Dedicated staff member (e.g., engagement specialist) with specific knowledge and training in PFC engagement
- Dedicated budget for PFC engagement and detailed funding guidelines for compensating PFC partners
- Measurement and evaluation capacity to support learning and improvement around PFC engagement and partnering strategies

Resources:

[Hiring an engagement specialist](#) (Algoma OHT, Job Description)

[Engage with Impact Toolkit](#) (Public and Patient Engagement Collaborative, Toolkit)



4. Development, learning and exchange

- Ongoing development and learning opportunities for staff and PFC partners are available and funded through the OHT (priority areas of focus to shift over time but initially could include the following):
 - EDI, trauma informed principles, and culturally safe spaces
 - Understanding different engagement approaches (e.g., consultation and advisory roles, collaboration and co-design, governance)
 - Mentorship (PFC partners)
 - Facilitation
- Ongoing opportunities for learning and exchange:
 - Learning about OHT partner organizations
 - Learning and exchange with other OHTs and PFC partners (e.g., Community of Practice) to promote shared understanding and approaches and to avoid duplication of effort
- Tailored development, learning and exchange supports for specific groups (e.g., Northern OHTs)

Resources:

[Patient, Family and Caregiver Engagement and Partnership Community of Practice](#)

[Communications and Community Engagement Community of Practice](#)

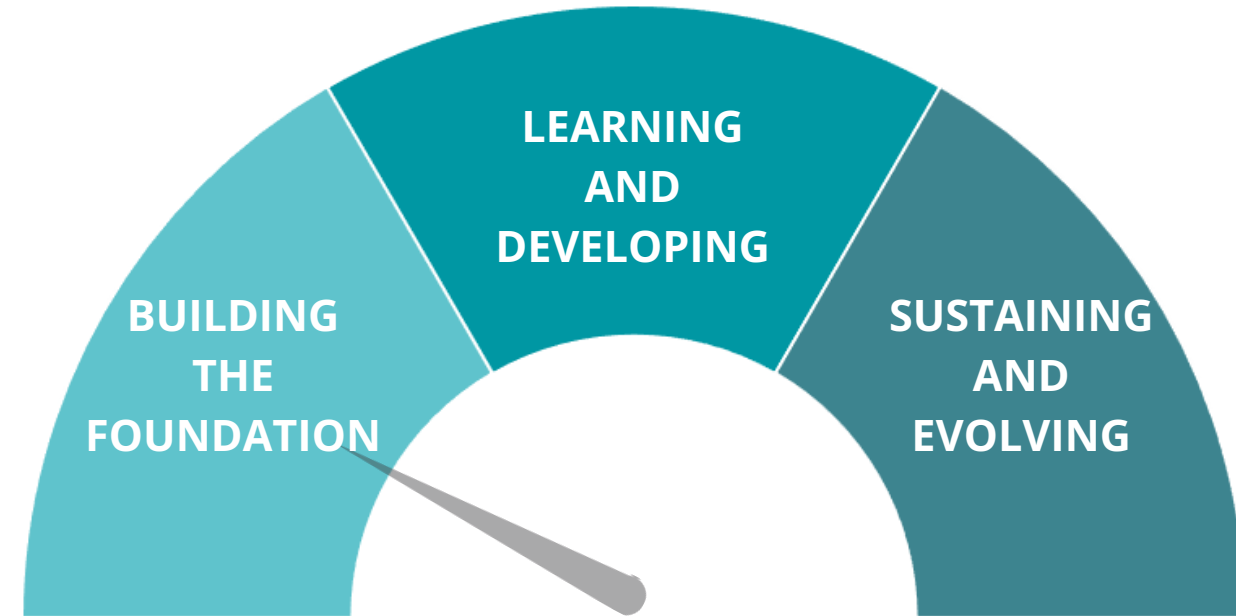
[OHT Engagement Learning Series \(Trillium Health Partners Institute for Better Health, Webinars, 2022-23\)](#)

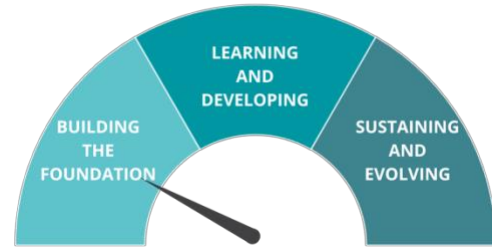
Patient, family and caregiver engagement and partnering in OHTs: A path to maturity

Building an organizational culture that supports and values PFC engagement, and successfully engages PFC partners in all activities, takes time and effort. It is not expected that OHTs will fully embody the values of an engagement capable environment from the outset but that they will build towards this over time. This section outlines the key expectations of OHTs at three stages of maturity:

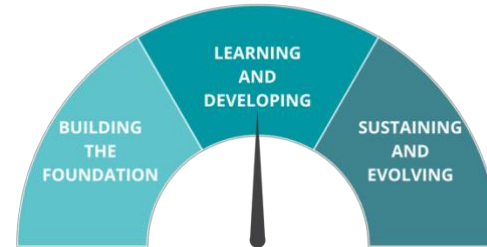
- Building the Foundation
- Learning and Developing
- Sustaining and Evolving

In the descriptions (below), for each of maturity stage, several milestones and expectations are outlined that align with the competencies and enablers identified in the framework. As OHTs build their engagement capabilities, they will move along the maturity path outlined here.

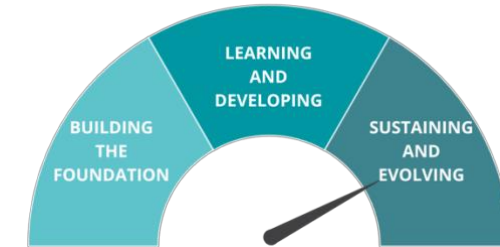




Level 1: Building the foundation



Level 2: Learning and developing



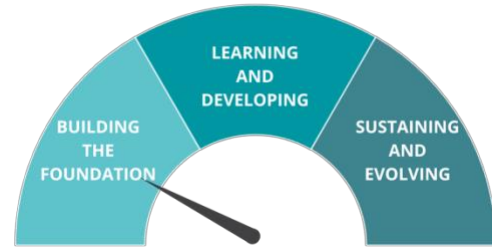
Level 3: Sustaining and evolving

Fostering a patient-centred culture

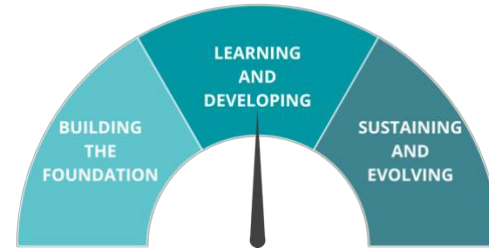
<ul style="list-style-type: none"> OHT recognizes that the quintuple aim (improved patient experience, better outcomes, lower cost, clinician well-being, health equity) cannot be achieved without the involvement of patient, families and caregivers at all levels OHT members work towards building a culture that supports openness, adaptability and curiosity 	<ul style="list-style-type: none"> PFC partnership and engagement practices are integrated across all OHT planning and operations to foster a patient-centred culture 	<ul style="list-style-type: none"> Culture of accountability is in place with established OHT-wide expectations for engagement and a clearly expressed philosophy that PFC partnership is foundational to the OHT
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Structures and approaches for engaging and partnering

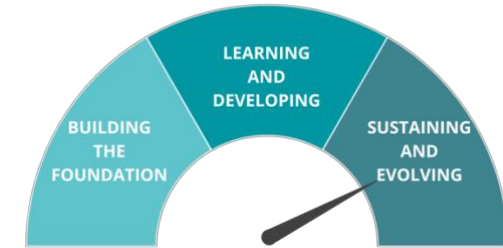
<p><i>Leadership and Governance of the OHT</i></p>		
<ul style="list-style-type: none"> Plan how PFC partners will be included in the leadership and governance structure of the OHT 	<ul style="list-style-type: none"> PFC partners are included collaborative decision-making structure(s) 	
<p><i>Engagement Structures</i></p>		
<ul style="list-style-type: none"> Determine the structures for engagement (e.g., Patient and Family Advisory Committee (PFAC), committees, working groups) and ways PFC partners will be involved in OHT activities Identify roles and responsibilities for OHT members, staff and PFC partners related to engagement Identify how information will be shared back with PFC partners and partnership structures following engagement activities Develop strategies and approaches that enable the creation of trauma-informed, safe spaces 	<ul style="list-style-type: none"> PFC engagement structures are in place and well supported (e.g., PFACs, PFC partners on committees) PFC partners are adequately represented on OHT structures (at least 2 per committee/group) Roles and responsibilities of OHT members, staff, and PFC partners related to engagement are clearly outlined and regularly reviewed OHT staff report back to PFC partners, PFACs and others on how input from engagement activities is used 	<ul style="list-style-type: none"> Meaningful and authentic engagement and partnership practices driven by the needs of PFCs and the communities they serve



Level 1: Building the foundation



Level 2: Learning and developing



Level 3: Sustaining and evolving

Policies and strategies to support the work

Patient, family and caregiver partnership and engagement strategy

- PFC Partnership and Engagement strategy is collaboratively developed and adopted by the OHT

- PFC Partnership and Engagement strategy has is regularly reviewed/revised
Workplans to implement the strategy are in place including metrics to assess the implementation

Patient, Family and Caregiver Declaration of Values for Ontario

- Patient, Family and Caregiver Declaration of Values for Ontario is adopted by the OHT

- PFC Declaration of Values for Ontario is a key element of the OHT's work. It is shared publicly, language from the declaration is embedded in OHT documents
- Partner organizations are supported to adopt the PFC Declaration of Values for Ontario

- OHT partner organizations have adopted the PFC Declaration of Values for Ontario and it continues to be highlighted and supported within the OHT

Funding for patient, family and caregiver engagement activities

- Funding and budget required for PFC engagement and partnering are considered
- Compensation policies for PFC partners are collaboratively developed and implemented

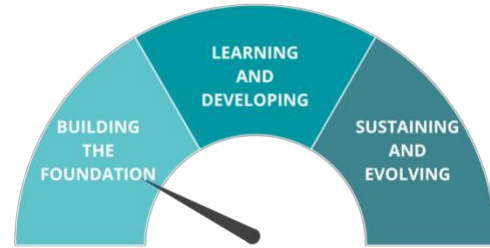
- Clear budgets for PFC engagement and partnering are in place
- Compensation policies are reviewed as needed

- Strategies and policies related to the funding of PFC engagement (e.g., staffing, PFC partner compensation, budget allocations) are clearly described and implemented

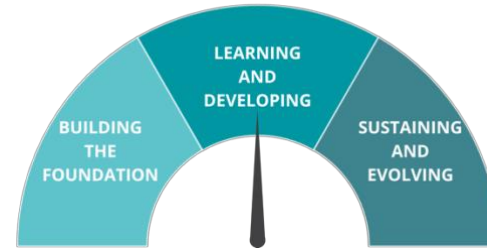
Recruitment and communication strategies

- Recruitment strategies and approaches are identified
- Communication strategies and approaches that emphasize open and transparent communication

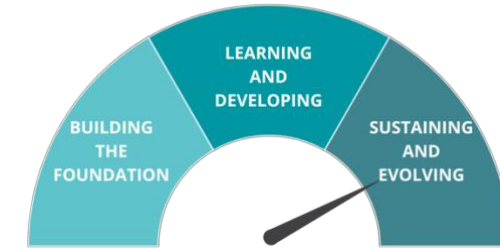
- Develop recruitment strategies tailored to different communities and populations including those who face significant barriers to engagement



Level 1: Building the foundation



Level 2: Learning and developing



Level 3: Sustaining and evolving

Building and sustaining capacity

OHT Staff

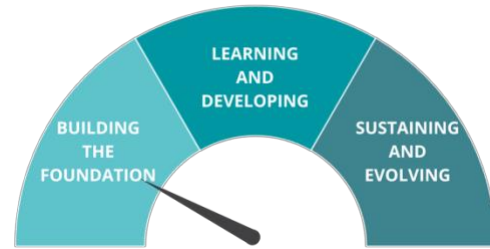
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| <ul style="list-style-type: none"> • OHT staff member with expertise in PFC engagement is hired or assigned to lead PFC engagement and partnering work within the OHT | <ul style="list-style-type: none"> • Continued support for PFC engagement and partnering from an assigned OHT staff member with expertise in engagement and partnering | <ul style="list-style-type: none"> • The OHT has a designated staff member whose primary role is to support PFC engagement |
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Patient, Family and Caregiver Partners

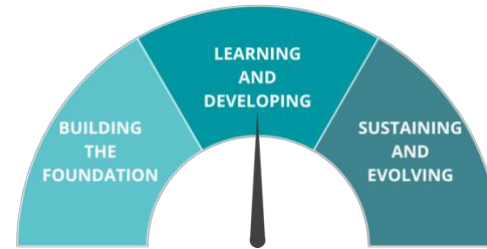
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| <ul style="list-style-type: none"> • Learn from partner organizations' history of and experiences with engaging PFC partners, including an understanding of the communities they serve • Recruit PFC partners for various roles within the OHT, considering how to reach individuals from a wide range of backgrounds and with a wide range of experiences and the barriers they may face to engagement • Onboard and orient PFC partners | <ul style="list-style-type: none"> • Continued recruitment of PFC partners from different communities and populations including those who face significant barriers to engagement • Development of an engagement culture that includes safe spaces for PFC partners from a wide range of backgrounds, and recognizes and addresses the potential for burnout | <ul style="list-style-type: none"> • Continuous recruitment of new partners that are representative of the communities that make up the OHT's attributed population |
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Training and capacity building

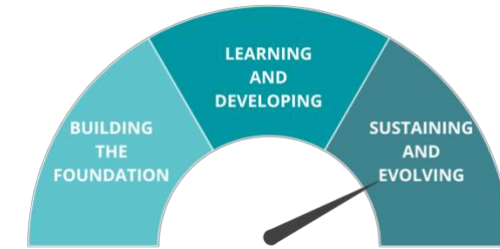
- Embed equity, diversity and inclusion principles in all capacity building activities
- Identify and prioritize training and development opportunities for OHT staff and partners to build engagement capacity and a culture of engagement (e.g., understanding of OHTs, health and social services systems, EDI principles, engagement approaches, principles of reconciliation and indigenous cultural safety)
- OHT staff and PFC partners actively consider and reflect on personal biases



Level 1: Building the foundation



Level 2: Learning and developing



Level 3: Sustaining and evolving

Evaluation for learning, improvement and impact

- Lead person in the OHT is identified with the responsibility for engagement evaluation (e.g., engagement lead, performance measurement team)
- Key stakeholders are identified who will lead PFC engagement monitoring and evaluation work with initial planning underway

- An evaluation plan is in place with short-, medium- and long-term goals for monitoring and evaluation related to key engagement structures, processes and activities
- Process evaluation of PFC engagement has begun; short-term impacts to be measured are being identified

- Continued evaluation and monitoring of short-, medium- and long-term goals for engagement
- Greater focus on understanding the impacts of engagement and partnering
- Sharing of best practices for PFC partnering and engagement within OHTs

This framework was developed by a working group of Patient, Family and Caregiver (PFC) partners, OHT leadership and staff, and Ministry representatives, co-chaired by Julia Abelson ([Public and Patient Engagement Collaborative \(PPEC\)](#), McMaster University) and Betty-Lou Kristy (Chair, Minister’s Patient and Family Advisory Council). Our work was informed by Healthcare Excellence Canada’s [Engagement-Capable Environments tool](#) and by consultations with PFC partners, OHT leadership and staff across the province between December 2022 and March 2023.

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