Appendix 1 (as submitted by the authors):
Strategic Clinical Networks™ (SCNs)
Patient Engagement Reference Group (PERG)

Engaging for Excellence: A Staff Liaison's Guide to Best Practice

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Alberta Health Services Inspiring solutions. Together.
Patient Engagement Reference Group

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The Engaging for Excellence Team Members

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- Sandy McMeekin
- Tracy Wong
- Karen Chinaleong-Brooks
- Darryl Lacombe
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- Terry Smith
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- Patty Wickson

A message from SCN Leadership

Patient and family engagement is the number one priority of the SCNs.

As SCNs, our purpose is to proactively engage with interested and knowledgeable individuals to lead and own ‘bottom-up’ innovations and improvements in health and healthcare. Patient and family advisors are a key component to SCNs achieving this goal. As an expert group who are equal members of our SCN family, advisors bring the voice of the people of Alberta to our priority-setting and planning tables.

To ensure engagement with advisors is meaningful, we need to create an equal playing field for all so that everyone can actively participate in the SCNs. Patient Engagement is a learned skill and we must be vigilant in understanding our role and how to best engage and support advisors in the work they do.

The role of the SCN staff liaison is to become skilled in effective patient engagement approaches, learning from our advisors and each other. In applying the best practices that support advisors, we can advance both the art and science of engagement within the SCNs and across AHS. Staff liaisons are vital to supporting SCNs’ work with advisors to build the best performing, publicly funded health system in Canada.

As we learn and grow in our roles, it is important to share our engagement experiences and knowledge so others may benefit. Learning from our past mistakes and embracing the views of various engagement partners will enhance our future.

The Engaging for Excellence guide shares some valuable lessons learned and knowledge gained over the last seven years. We invite you to read this document and join in our learning journey. We are all students of engagement.

Braden Manns
Associate Chief Medical Officer,
Strategic Clinical Networks

Tracy Wasylak
Chief Program Officer,
Strategic Clinical Networks

Our what and why

What is this guide about?

This guide provides SCN staff liaisons with practical knowledge to help support patient and family advisors who volunteer with SCNs. The guide is from the points of view of advisors and shares their tips on how to engage with them in a meaningful way.

In the guide, you will find links to other resources such as websites, multi-media presentations, tip sheets and checklists. These resources provide other options for learning and helpful tools to support you in your role.

Sections that have a checklist or tip sheet attached have an icon before the section heading. Call-out boxes give important information and quotes from advisors. Clicking on hyperlinks takes you to additional resources.

In this guide, we refer to patient and family advisors as "advisors" and patient and family engagement as "engagement."

This is an electronic document. If you choose to print this guide, you can find the information related to hyperlinked text in the resource section.

Why we created this document?

A number of resources exist to help you recruit and involve advisors in your work (check out the Engagement and Patient Experience (EPE) resources). However, few resources show how to maintain and sustain meaningful engagement with advisors. This guide aims to fill this gap.

The purpose of this guide is to:

- Outline the roles and responsibilities of an SCN staff liaison
- Identify resources that can support SCN staff
- Provide tips, tools, and strategies to support meaningful engagement with advisors

What is meaningful engagement and why is it important?

Here is what advisors say meaningful engagement is to them:

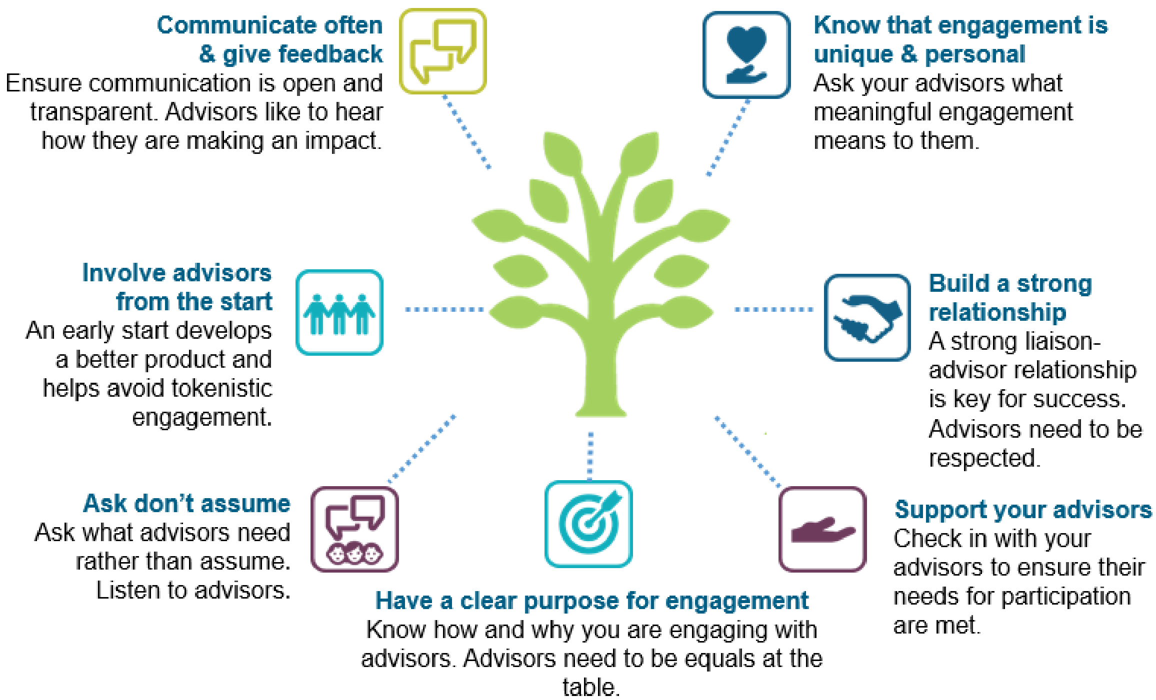
Meaningful engagement = Participating in something that one sees of value and where one is valued.

Why meaningful engagement is important

It is important for patients and their families to be a part of creating programs, services and policies that affect their care. Advisors need support in having their voices heard and gaining the confidence and skills to influence the people making these decisions.

Meaningful engagement may look different depending on the advisor, the SCN, or the time and resources available. However, there are some general principles you can follow to help you meaningfully engage with advisors.

Actions to support meaningful engagement



Tokenism

When meaningful engagement does not occur, advisors have told us that they feel used as a token:

I feel like a nobody.

I feel like I am nothing more than a bum in a seat.

I feel I was invited so a box could be checked.

Meaningful Engagement versus Tokenism

Meaningful Engagement	Tokenism
Has a defined staff liaison who knows and is committed to their role of supporting advisors	Has a staff liaison who is not aware of or lacks the knowledge and resources to perform their role
Involves advisors early in the process	Involves advisors **late** in the process or **after** the work is completed
Values and appreciates advisors as volunteers giving freely of their time	Lacks respect for advisors' time and efforts or gives tight timelines
Prepares for advisors to successfully contribute before inviting them to the table	Rushes into engagement without adequate planning
Values the experiences and views of advisors	Doesn't value advisors' opinions or ideas
Has a clear purpose for the work and for engaging advisors	Lacks a clear goal for the work and reason for engaging advisors
Is clear about the level of engagement and informs advisors if there are changes	Provides an engagement description that does not match the opportunity
Explains to advisors why their input was or wasn't used	Doesn't tell advisors the outcome of their input
Uses language that promotes building on ideas such as "Yes, and…"	Uses language that shuts down ideas such as "Yeah, but…" or "No, but…"
Involves more than one advisor in the work to ensure diversity in advisors' views and peer support for advisors	Doesn't consider diversity or advisors' need for peer support

Meaningful engagement only happens when you have a passion and belief that engaging advisors is the right thing to do.

Our who

Who is involved in meaningful engagement?

The people you engage with may vary based on the project or the purpose for engagement. However, in the SCNs, the people who are typically involved in engagement are the:

- Advisors
- Staff liaison
- SCN leadership
- Other SCN staff and stakeholders

> Nothing to, for or about us, without us.
>
> - Quote from an SCN advisor

Who is an SCN advisor?

Advisors are patients, family members or caregivers who give freely of their time, energy and themselves to take part in SCN activities. These volunteers balance their desire to get involved with:

- Personal and family commitments
- Their personal health and well-being
- The benefits of participation to them or others on a similar journey

An advisor's role in SCN work can vary depending on their availability, interests and experience. To learn more about the roles and responsibilities of advisors, check out the Patient and Family Advisors: Roles and Responsibilities webinar.

Staff as Advisors

Presently, as stated in the AHS Staff and Physicians as Patient/Family Advisors memo, SCNs do not recruit current or recent Alberta Health Services (AHS) employees or physicians into advisor roles. Before you recruit a new advisor, ask if they are an AHS employee or physician, or if they have been one in the last 12 months. If the answer is "Yes," they can't be an advisor until a year has passed from the time they worked for AHS.

If an advisor has a healthcare background, suggest they volunteer in an area that focuses on their patient or family experience and not their healthcare training. This helps to ensure they bring the patient and family viewpoint forward.

Advisors Doing the Work of Paid Staff

Remember not to ask advisors to do work that a paid AHS staff member should do, as they are volunteers. Ask yourself: “If an advisor isn’t available to do this work, would a member of staff have to do it?” If yes, consider whether the work is suitable for an advisor. If you have questions about this, contact the SCN Patient and Family Engagement Team.

Who is an SCN staff liaison?

As a staff liaison, you’re the main contact advisors have with the SCN. You build the relationship between the SCN and advisors by:

- Getting to know and spending time with advisors so they can contribute to your SCN’s work in a meaningful way
- Providing advisors with the information, resources, background materials and support they need to participate in the work of your SCN
- Supporting advisors in SCN-related matters such as if they experience difficulties, decide to take a step back, or change their level of involvement
- Discussing the expectations of your SCN and advisors
- Paying attention to advisors before, during and after SCN activities

The relationship between you and advisors is key to meaningful engagement. In many ways, the qualities of a good staff liaison mirror those of a good advisor.

Qualities of a Good Advisor	Qualities of a Good Staff Liaison
Has the time and desire to partner with others to improve healthcare	Works “with” advisors not doing “to” or “for” them to improve healthcare
Open to giving and receiving feedback	Welcomes and encourages feedback and suggestions
Has a sense of humour	Has a sense of humour
Shares information in a way that others can learn	Listens more than speaks and keeps the lines of communication open
Is passionate about patient and family-centred care and engagement	Practices and walks the talk of meaningful engagement
Is open to and respectful of hearing the perspectives of others	Respects advisors’ perspectives and who they are
Is open to different ideas and approaches	Is willing to learn and try new things

Qualities of a Good Advisor	Qualities of a Good Staff Liaison
Respects the sensitivity and privacy of information shared	Is dependable, respectful and caring, and creates a safe space for open and honest discussion
Strives to develop oneself and supports others in doing the same	Strives to develop oneself and encourages others to do the same
Shares aspects of one’s own experience willingly	Shows vulnerability by sharing aspects of one’s own story
Supports other patient and family advisors	Supports patient and family advisors and SCN staff members
Is positive, energetic, and keen	Is positive, energetic, and keen
Is open to different ideas and solutions	Facilitates and is open to different ideas and solutions

Who is a good fit as an advisor?

A good fit between an advisor, the SCN, the staff liaison and the work is important. Advisors who have similar values to the SCN’s and are motivated to work with others to improve healthcare, often find their involvement fulfilling. This type of meaningful engagement can reduce advisor turnover, improve advisor and staff satisfaction, and increase team productivity and effectiveness.

Tips to help guide a good fit

Below are some suggestions you can follow to help promote a good fit between an advisor and an SCN:

- Meet with potential advisors before inviting them to join the team. Get to know their interests and passions
- Explain the role and the expectations of advisors
- Describe the work and direction of the SCN
- Once advisors have been onboarded, you can invite them to attend a couple meetings before they commit to the role
- Meet with advisors before and after their first meeting to prepare and debrief them

Share information on the work before asking an advisor to attend a meeting.

- Consider a trial period. This gives you a chance to check in with your advisor and the other members of the SCN team to see how the relationship is going

It is important to talk with advisors regularly to see whether their involvement is still a good fit. This allows them to speak freely about their experiences and enables you to help them with challenges, if needed.

When it may not be a good fit

There are several reasons why the advisor's relationship with the SCN may not work. Four of the most common reasons are:

1. **The advisory nature of the role.** Advisors and advocates both play a part in change but there is one key difference. An advisor seeks to inform a process, while an advocate seeks to ensure a specific outcome. SCNs partner with advisors to change the system for the benefit of all. If your advisor doesn't understand the difference between these two approaches to change, it may lead to them being unhappy in their role.
2. **The type of the engagement.** Ask your advisor how they would like to contribute and what they would like to get out of the experience. This ensures you meet their needs and the needs of the SCN.
3. **The time commitment.** Your advisor's personal situation may change or they may not have known the amount of time the work would take from their personal lives. Check with your advisor often to see how things are going and how they are coping.
4. **The real or perceived slow pace of change.** Your advisor may get frustrated with the pace of change in AHS. Keep your advisor informed about the work they are involved in and the progress of planned changes.

You may also want to think about an advisor's fit if they begin to:

- Dominate conversations
- Show lack of control with strong emotions
- Bully or affect the mental and emotional safety of other team members
- Be constantly negative
- Breach confidentiality or agreed upon codes of conduct
- Use their professional skills more than their advisor voice
- Move away from giving advice and start advocating for specific outcomes

These actions may be signs that your SCN's work is triggering an issue from their past or their hopes for involvement don't align with the SCN's mission.

Next Steps

Sometimes, in spite of everyone's best efforts, the advisor/SCN relationship or opportunity isn't a good fit. You may need to explore ways to work on repairing or ending the relationship on good terms. If your team believes an advisor is no longer a "good fit," contact the SCN Patient and Family Engagement Team. They can help you decide on the best way to address your situation.

Absent advisors

If an advisor is not attending meetings, send them an email or give them a call to see if they are okay. Your advisor's health, personal, work or family life may have changed. Depending on their situation, you may want to suggest other ways they could get involved that are more flexible and less time consuming. Sometimes your advisor may need to step away from the work briefly or completely.

If your advisor's level of commitment changes or they have decided to step away, let the SCN Patient and Family Engagement Team know by emailing patientsaspartners.scn@ahs.ca. This is important because the team needs to record and inform Volunteer Resources, Patient and Family Engagement of your advisor's change in status.

Who supports staff liaisons?

Support from your SCN leadership team is vital to your success as a staff liaison and to the meaningful engagement of advisors.

Ways your leadership can support you:

- Give you time to perform your duties as a staff liaison
- Champion new policies and processes that strengthen patient engagement
- Set expectations for your SCN to work with patients and families as partners
- Promote and support opportunities for advisors to be meaningfully engaged
- Advocate for patient engagement with all members across your SCN
- Create a mutual learning environment – being open to new ideas and feedback to improve your SCN's patient engagement practices
- Demonstrate, through their actions, that they support meaningful engagement
- Value and appreciate advisors and their efforts

If you feel you are unable to perform the role of a staff liaison well, let your leaders know. There may be a need to discuss how your leaders could better support you.

Other supports for you are available through the SCN Patient and Family Engagement Team and Volunteer Resources, Patient and Family Engagement. You may also want to consider reaching out to other staff liaisons to get some tips and tricks.

Our how

How to meaningfully engage advisors?

As the staff liaison, you play a key role in supporting your SCN to build a successful and meaningful relationship with advisors. In this role, you become your SCN's relationship broker. You match advisors with teams where there is the chance for both parties to draw from their strengths to partner, share and create a vision together.

In addition to building a relationship with advisors, it is important to encourage them to foster relationships with other advisors and members of the team. For example, you can encourage advisors to join the Patient Engagement Reference Group (PERG). This gives them opportunity to:

- Network with other advisors
- Learn more about their role
- Pursue areas for growth as an advisor

Building a meaningful relationship with advisors

Respect and Trust:

- Share a bit about yourself, as it helps to build trust and rapport with advisors
- Value advisors in terms of their time, experiences, who they are, and what they have to offer
- Ensure opportunities offered to advisors are truly meaningful, not tokenistic, and are based on their interests, time and skills

> Respect, trust and open communication are key to the staff liaison and advisor relationship
>
> - Quote from an SCN advisor

Care and Support:

- Be your advisor's first point of contact for all SCN-related issues and provide mentorship and guidance
- Help advisors…
    - Understand your SCN's operations and the work they are involved in
    - Establish healthy boundaries in their advisory role
    - Build relationships with other SCN staff as well as with other advisors

Communication:

- Listen to understand – advisors often feel unheard
- Validate advisors' comments and explain issues where needed
- Contact advisors regularly and invite them to connect with you
- Be open to feedback, share your views, and be willing to make changes
- Celebrate outcomes and successes! This tells advisors that they are valued, their time is well spent and they have a positive impact

How to support new advisors?

Things to consider before starting with a new advisor

Before asking advisors to become involved in the SCN's work, ask yourself and your leadership team these questions:

1. Why are we involving advisors – what is our goal?
2. Does the team have experience working with advisors? If not, what do you need to do to prepare your team?
3. How can advisors best contribute their unique perspectives to the work?
4. Have you tailored your agenda to get the most from advisors?
5. Do advisors know what your SCN team expects of them?

In addition to thinking through these questions, check out the EPE team's Readiness Checklist for Partnering with Patient and Family Advisors. This resource provides other things you should consider before inviting advisors to join your team.

Things to consider when selecting advisors

Choose advisors based on the type of work and tasks they will support. Beyond having relevant health experience, look for qualities such as their ability to:

- Be flexible

- Get involved and work in partnership with others
- Communicate with mutual respect (listen, encourage, praise, thank, and help)
- Work towards a solution without pushing for a specific outcome
- Give and take constructive feedback
- Be patient and understand that change takes time

Discuss with your advisor how they will be involved in the work and at what level. Align their interests and skills to the work. Respect that the way and level at which each advisor wishes to get involved varies.

Engaging a new SCN advisor

A new advisor can join your SCN in a number of ways. However before they begin in the role, ensure your advisor completes the onboarding terms and conditions for AHS volunteers. Below is the process for engaging a new SCN advisor. This process mirrors the EPE's Engaging Patient and Family Advisors Quick Reference Guide, but the persons involved and the work varies.

Process for engaging a new SCN advisor

Potential Advisor	SCN PFE* Team or Staff Liaison	SCN PFE* Team or Staff Liaison	SCN PFE* Team	Staff Liaison
• Expresses an interest in becoming an advisor • Is identified by an SCN staff member or others	• Meets with potential advisor • Learns about advisor's healthcare experience, interests and passions • Outlines the differences between an advisor and	• Provides an overview of the SCNs • Outlines key components of the SCN advisor role • Highlights ways advisors can get involved • Provides time to	• Responds to the decision to become an advisor • Connects the advisor to Volunteer Resources • Schedules a meeting with the SCN staff liaison to discuss	• Confirms with SCN PFE Team that advisor is fully onboarded • Begins relationship-building • Shares SCN-specific information and ways to get involved

Potential Advisor	SCN PFE* Team or Staff Liaison	SCN PFE* Team or Staff Liaison	SCN PFE* Team	Staff Liaison
	an advocate and confirms understanding • Discusses and confirms the importance of confidentiality • Evaluates fit as an advisor	decide if the person would like to become an advisor	opportunities and fit • Ensures advisor is fully onboarded • Provides advisor orientation	• Invites advisor to sit in on a couple of SCN meetings • Confirms a good fit between advisor and the SCN

*SCN PFE Team – Strategic Clinical Network, Patient and Family Engagement Team

As soon as the advisor joins your SCN team, start actively building your relationship. Find opportunities for your advisor to get involved. If you don't, your advisor may feel forgotten and disengage.

Introducing the advisor

Once you have confirmed that your advisor is fully onboarded, have them attend a couple of meetings before formally starting in their role. This gives your advisor a chance to get familiar with the team and to decide whether this work is a good fit for them.

As the staff liaison, it is good practice to:

- Provide your advisor with your contact information
- Share team members' names and their role in the team – consider including their pictures
- Give background information on the team including its purpose and previous work
- Share the team's goals for their present and future work
- Introduce your advisor to other advisors on the team
- Describe how the team sets priorities and makes decisions
- Discuss how your advisor can contribute

- Confirm your advisor has completed all volunteer onboarding terms and conditions as per AHS policy

The first meeting

Here are ways you can support your advisor at their first meeting:

1. Be there to meet your advisor when they arrive to help them feel comfortable.
2. Introduce your advisor to the chair(s) of the meeting.
3. Prepare your advisor to introduce themselves. Help them keep their introduction short and simple.
4. Use name tags to identify team members and their role in the team. Ask team members to introduce themselves by stating their name, position and role in the team.
5. Sit next to your advisor in the meeting and during breaks to ensure they don't feel alone.
6. Avoid asking your advisor to share their story at their first meeting. If you get a request for your advisor to share their story, support your advisor. You can find tips in A Storytelling Resource Kit for Patient and Family Advisor.

How to support advisors?

Meeting support

Advisors may hold different roles in meetings. The role they hold depends on their skills and experience, the structure of the meeting, and the meeting content.

You play a critical role in ensuring advisors feel mentally and emotionally safe, and are welcome members of the team. You should support advisors before, during and after meetings (e.g. online, Skype, face-to-face).

Before meetings

Advisors are volunteers who give of their time and energy to support your SCNs' work. They also have professional and personal commitments outside of AHS. Send meeting materials to advisors as early as possible – at least one week before the meeting. This gives advisors a chance to read through the material, research the things they are interested in, and reflect on parts of the meeting that are important to them. The Supporting Advisors Before Meetings checklist gives more detail on other things to consider.

Pre-Meeting Briefing

A key part of supporting advisors is making sure they have the knowledge, skills, and resources they need to participate in meetings. Ensuring advisors are prepared helps build their confidence and allows them to fully engage. Offer to schedule time, before each meeting, to meet with advisors (by phone or in person) to:

> I make the time for the meeting, so I want to give valuable feedback.
>
> - Quote from an SCN advisor

- Review agenda items
- Explain what will happen in the meeting, and the information to review
- Provide context to agenda topics such as their history and conflicts that may arise
- Explain policies, technical terms, and acronyms
- Give advisors a chance to ask questions in a safe setting

During meetings

Be a trusted ally for advisors. This means being someone advisors can confide in and trust. It also means providing them with feedback or suggestions to help them better participate in and contribute to SCN discussions. As a staff liaison, you bring a sense of security to advisors and can help strengthen the relationship they have with other team members. Here are some tips to help you:

1. **Plan to be at the meeting with advisors.** If you can't make the meeting, arrange for another team member to be there to support advisors; let advisors know.
2. **Be sensitive to advisors' comfort level.** Don't force them to participate, especially in the beginning. Allow advisors to participate when and at the level they choose.
3. **Remind your team of the value of hearing everyone's point of view.** It gives a clearer picture of the issue, promotes involvement and helps people feel valued.
4. **Create opportunities for advisors to share their opinions during discussions and acknowledge their contribution.** This boosts their participation and confirms their role as a fully contributing member of the team.
5. **Acknowledge negative experiences but move the discussion forward.** Ask questions such as: "What can we learn from this? How can we prevent or improve this?"
6. **Avoid jargon, technical terms and acronyms.** Remind your team to take the time to explain these terms if they have to use them.

Debrief meetings

Debriefing provides you a chance to learn how the meeting went from advisors' perspectives. It also gives you a chance to discuss with advisors whether they are satisfied with their role and to see if they have any concerns.

Give an opportunity for advisors to connect with you after a meeting. Schedule the debrief meeting with plenty of time for discussion to avoid feeling rushed. It is important to:

- Let advisors discuss their thoughts and experiences about the meeting they attended
- Have advisors share their feelings about their level of participation and involvement
- Ask advisors for ideas to improve their experience
- Discuss any concerns or issues advisors have and develop a plan to address these
- Identify and manage potential issues
- Answer advisors' questions; if you don't have the answers, commit to finding them
- Check that the briefing was helpful, provide extra support or resources, if needed

It's also a good idea to send advisors a simple thank-you email. Doing so can help recognize the contributions of advisors and further engage them in the work.

Meeting tips

To learn more ways to help make your meeting space more relaxed and supportive, check out the Tips for Facilitating Successful Meetings.

How to support advisors when a project ends?

It is important for you to connect with advisors when a project ends; this keeps them engaged and shows your appreciation for their work. Be sure to:

- Thank advisors for their involvement
- Let them know how they contributed to the final outcome of the work
- Ask if and how they wish to continue

Once you know how your advisor wants to proceed, let the SCN Patient and Family Engagement Team know. They will update your advisor's records and support them in their decision.

How can multiple staff liaisons work together?

As the work of an SCN grows, the SCN may need to have more than one staff liaison. Though there are benefits to this approach, such as shared work load, there are also potential risks. For example, disorganized role sharing can leave advisors feeling abandoned or confused.

When multiple staff liaisons are supporting advisors, set up a central communication or coordination process. Consider using one or more of the methods:

- Schedule regular staff-liaison meetings to keep each other up to date on the status of advisors you support and strategize ways to improve engagement
- Save a list of advisors, the projects they are involved in, and the staff liaison responsible on your shared drive
- Check in with other staff liaisons when work ends to see if they have opportunities for advisors to get involved
- Elect a lead staff liaison to take responsibility for the overall support of advisors in your SCN

If your SCN chooses to have more than one staff liaison, it is vital that support to advisors is coordinated and consistent to avoid confusion.

Staff liaison wellness and well-being

Supporting advisors can affect you in different ways – it is important for you to take care of yourself. Here are some tips to help you maintain your well-being.

- Be aware of the power of advisors' stories and perspectives – it's normal for these to have an impact on you
- Have someone to bounce ideas off and who can provide objective feedback – seek out someone to de-brief with who is safe and professional
- Take time for self-reflection and whatever other self-care you may need – find ways to maintain the balance between your own mental health and spiritual wellness
- Connect with other staff liaisons for peer support
- Ask your leadership team for the support you need

Advisor wellness and well-being

Advisors are often balancing the demands of their health, personal life, work life and their advisor role. Sometimes advisors become at risk for burnout. You can help prevent advisor “burnout” by reviewing the factors on the Preventing Advisor Burnout Checklist and creating a plan to help advisors manage them.

Expenses and related support

Below are some other areas where you may need to support advisors. Having administrative (admin) support in this area is a good idea. If you have questions about advisor expenses and related supports, contact the SCN Patient and Family Engagement Team.

Expenses

You or your SCN admin should manage advisors’ expense claims related to your SCN’s core committee, working group and other related meetings. To do this:

- Explain the expense claim process to advisors and let them know, wherever possible, the SCN will cover costs up-front
- Tell advisors what out-of-pocket expenses they can claim
- Let advisors know that their expenses must be pre-approved by the SCN
- Ensure advisors know who will help them with their claims and where to submit them
- Send advisors expense claims to Accounts Payable within one week of receiving them
- Provide advisors with a claim form to use for each event they attend
- Respond, within one working day, to advisor emails asking about the status of their expenses
- Encourage advisors to sign up for direct deposit to avoid delays in getting their money back
- Ensure advisors are getting their claims repaid in a timely manner; if this is not happening, it may affect your relationship with them

Ensure advisors are never out of pocket when supporting the work of your SCN.

Pay advisors promptly for their out-of-pocket expenses. Ensure advisors have the most current version of the AHS Universal Advisor Expense Claim form and companion guide. Let them know their first claim will take longer to process as they need to be set up in the system.

Taxi vouchers

- Provide advisors, who use taxis, with a small supply of vouchers. Let them know to ask for more before they run out
- Keep a stock of blank taxi vouchers
- Provide advisors, who attend meetings outside of their hometown, with enough vouchers to get them to and from their home site, their hotel and the meeting venue
- Mail or courier taxi vouchers to advisors in advance of their travel date to ensure they have them to use during their stay
- Provide advisors with taxi vouchers to use for travel to and from core committee or working group meetings

There are differences in the use of taxi vouchers across the province. If you would like more information on the use of taxi vouchers, contact the SCN Patient and Family Engagement coordinator.

Transportation and accommodation

Always ask advisors if they need you to arrange their travel or accommodation. If you have admin support, it is best to have them make all travel plans for advisors. This ensures advisors don’t have to pay travel costs out of pocket or worry about making hotel and travel arrangements. It also ensures your SCN gets AHS rates.

Tips for advisor’s travel and accommodation

- Ask your advisor for their preferred travel dates and times, modes of travel, and type of accommodation (e.g. near medical facilities)
- Find out if your advisor has special travel needs such as an aisle seat, special diet, a scent-free room, or parking close to entrances
- Book your advisor’s travel through AHS’ approved travel agency
- Forward e-tickets and confirmations to your advisor along with a blank expense form and a list of out-of-pocket expenses they can claim
- Provide advisors with your contact information in case of an emergency during their trip
- Check in with your advisor before their trip to ensure they have everything they need

Ensure advisors are satisfied with the admin support they receive.

- Follow up with your advisor, a week after their trip, to find out how everything went. If problems occurred, find out why to prevent it happening again
- Remind your advisor to submit their out-of-pocket expense claims or confirm receipt of their submitted claims and provide an estimated time for the refund

Meals

If you ask advisors to work during meal times, when you can, provide a meal. Ensure the person ordering the food knows of and follows any diet restrictions. If it is not possible to provide a meal, advisors may need to purchase their own food and submit an expense claim.

Volunteer hours:

Remind advisors to record their hours, in a timely manner, in the AHS Volunteer Management System. Better yet, create a process for your SCN to do this. Tracking volunteer hours allows AHS to record donated time in support of funding. If advisors have questions about the database or need a reminder on how to use it, they can contact Volunteer Resources, Patient and Family Engagement.

How to communicate with advisors?

At your first meeting with an advisor, ask how they would like you to communicate with them. Communication can be by text, phone, email or in-person and will depend on your advisor's preference and the tools they have.

> Radio silence kills engagement.
>
> - Quote from an SCN advisor

In the SCNs, email is the main mode of communication. Find out if this is your advisor's preference. If so, ask them if they have access to email and the email address they would like to use.

At your first meeting, discuss with your advisor their hopes for communication. Be honest about what is realistic in terms of communication: Under promise and over deliver.

Give your advisor a chance to tell you how often they would like to hear from you and the type of information they need. For advisors who are not actively involved in your SCN, progress updates can keep them connected to your SCN's work. This also increases the chance of them taking part in new projects.

Sending emails

Emails are a quick, easy and useful form of communication; however, they can often leave the reader confused. Below are a few things to keep in mind when emailing advisors:

1. Give advisors time to respond – advisors may not check their email every day.
2. Obtain advisors' consent to share their email – it is their right to choose who they would like to connect with.
3. Blind carbon copy (BCC) advisors on emails unless you have their consent to share their email address. People may send random requests to advisors through shared emails.
4. Be clear, concise and provide context in your emails. Don't expect advisors to read through a chain of messages to understand the request.
5. Remember, advisors may require special permission to access some programs (e.g. SharePoint). Arrange access for them, as needed.
6. Don't use email to solve a conflict or where the situation may be misconstrued. Call the person and speak to them directly instead.

Keep advisors' information confidential unless they give you permission to share it.

If you bombard people with emails, sooner or later they tune you out. Carefully consider what you need to share to limit the number of emails you send. For more ideas about emailing, check out the AHS Guidelines for Email Etiquette.

Booking meetings

Some advisors may prefer not to receive calendar invites for meetings. However, for those who do, SCNs often use Microsoft Outlook to send calendar invites for Skype meetings. To ensure advisors receive the necessary meeting-related information:

1. Confirm you have the correct email address for advisors.
2. Follow up your calendar invites with an email that gives the date, time and call-in information for your meeting.
3. Give advisors at least a day's notice before cancelling a meeting. If this can't be done, call or text advisors to ensure they receive the notice.
4. Limit the number of meeting requests and changes you send. Multiple emails listing changes can confuse advisors and cause them to miss meetings or updates.

Ask advisors for their permission to copy them on a meeting invites.

Remember to ask advisors' permission to copy them on a meeting invite because Microsoft Outlook does not allow you to BCC attendees.

Recognition

True gratitude goes a long way. It helps keep people engaged especially when work is long and progress is slow. Show gratitude to and validate advisors. Let them know you appreciate their time and have heard and respected their perspectives, even if you don't agree.

Some simple ways you can recognize and validate advisors' efforts include:

- Sending a short thank-you card, an email or calling advisors after meetings
- Thanking advisors for their input in SCN work
- Sharing with advisors SCN improvements they contributed to
- Showing advisors where their patient voice shaped discussions or decisions in your SCN
- Recognizing advisors during special occasions (such as Volunteer Appreciation Week)

How to evaluate meaningful engagement?

Evaluate engagement activities to determine what went well and where you can improve.

Possible evaluation times

- **During engagement.** This gives you the chance to make changes throughout
- **During and at the end of engagement.** The information you gather can help you make changes along the way, determine what went well, and how to improve
- **Only at the end.** You will not have the chance to make changes along the way, but it could help you determine what went well and how to improve future engagements

It is important to evaluate both the process and the outcome of your engagement. This will help you understand what the engagement experience was like for everyone involved, and where and how to make changes.

Developing your evaluation plan

- Design your evaluation so you can use it during and at the end of engagement
- Determine your evaluation process and methods before engagement begins
- Ensure you include relevant stakeholders in the design process
- Decide whether you will use formal (e.g. surveys) or informal (e.g. conversations) evaluation

Why evaluate

Evaluating helps to:

- Gather information about the impact advisors have on your initiative
- Identify ways to improve your engagement process

The Engagement and Patient Experience team has created some evaluation resources. If you would like further support around the evaluation of your engagement, contact the SCN Patient and Family Engagement Team.

Our resources

Below is a list of resources we commonly use. The Engaging for Excellence Team developed some of these resources while external partners created others. External resources we have referred to are also included in our reference list.

Some resources are available on the AHS intranet. If you don't have access, please contact patientsaspartners.scn@ahs.ca to retrieve a copy.

Communication

Guidelines for Email Etiquette
This resource is available on the AHS intranet. If you don't have access, please contact patientsaspartners.scn@ahs.ca to retrieve a copy.

Community Engagement

Guide to Community Engagement
This resource is available on the AHS intranet. If you don't have access, please contact patientsaspartners.scn@ahs.ca to retrieve a copy.

Community Engagement Toolkit
This resource is available on the AHS intranet. If you don't have access, please contact patientsaspartners.scn@ahs.ca to retrieve a copy.

Evaluation

The Value of Engaging Patients and Families
This resource is available on the AHS intranet. If you don't have access, please contact patientsaspartners.scn@ahs.ca to retrieve a copy.

Expenses

Advisor Out-of-Pocket Expenses List
https://www.albertahealthservices.ca/assets/about/scn/ahs-scn-perg-advisor-expenses.pdf

Guide for Processing Expenses for Patient and Family Advisors
This resource is available on the AHS intranet. If you don't have access, please contact patientsaspartners.scn@ahs.ca to retrieve a copy.

Travel, Hospitality, and Working Session Expenses – Approval, Reimbursement, and Disclosure
This resource is available on the AHS intranet. If you don't have access, please contact patientsaspartners.scn@ahs.ca to retrieve a copy.

Universal Expense Claim for AHS Patient and Family Advisors
http://www.albertahealthservices.ca/frm-20311.pdf

General resources

The Beryl Institute
https://www.theberylinstitute.org/

Get to Know your Advisor

https://www.albertahealthservices.ca/assets/about/scn/ahs-scn-perg-know-your-advisor.pdf

Meaningful engagement

A Guidebook for Engaging Patient and Family Advisors:
https://www.albertahealthservices.ca/assets/info/pf/pe/if-pf-pe-guidebook-for-engaging-patient-family-advisors.pdf

Engaging Patient and Family Advisors:
This resource is available on Insite, the AHS intranet. If you don't have access, please contact patientsaspartners.scn@ahs.ca to retrieve a copy.

Engaging Patient and Family Advisors Decision Tree:
This resource is available on Insite, the AHS intranet. If you don't have access, please contact patientsaspartners.scn@ahs.ca to retrieve a copy.

Meaningful Engagement
https://www.youtube.com/watch?v=j2Bu55URAaA&feature=youtu.be

Patient and Family Advisors: Roles and Responsibilities
https://www.youtube.com/watch?v=n5ZE7Y8hhIk&feature=youtu.be

Staff Liaisons: Roles and Responsibilities
https://www.youtube.com/watch?v=OipXifDbirs&feature=youtu.be

The Value of Engaging Patients and Families:
This resource is available on Insite, the AHS intranet. If you don't have access, please contact patientsaspartners.scn@ahs.ca to retrieve a copy.

Meetings

Supporting Advisors before Meetings:
https://www.albertahealthservices.ca/assets/about/scn/ahs-scn-perg-supporting-advisors-before-meetings.pdf

Tips for Facilitating Successful Meetings:
https://www.albertahealthservices.ca/assets/about/scn/ahs-scn-perg-tips-for-facilitating-meetings.pdf

Onboarding Requirements for Volunteers

You must complete the following onboarding requirements before an SCN advisor begins in their role:

- An interview (completed by the SCN Patient and Family Engagement Team)
- Reference checks (two references)
- A registration form to become an AHS volunteer (online via the AHS Volunteer Management system)
- A Confidentiality and User Agreement
- A Consent to Collect, Use, and Disclose Stories, Photos, and/or Video and Sound Recordings form
- **A Criminal Record Check (CRC)***
- A Conflict of Interest form, if required
- AHS Volunteer Orientation (online learning module) which includes the Privacy and IT Security & Compliance video
- Orientation to the SCN advisor role provided by the SCN Patient and Family Engagement Team

*****Criminal Record Checks can take a few weeks to be completed. It is important to provide enough time for recruitment, onboarding, and orientation of advisors. AHS covers the cost of CRCs for volunteers.

Patient Engagement Reference Group (PERG) Resources

What is PERG?

https://www.albertahealthservices.ca/assets/about/scn/ahs-scn-perg-what-is-perg.pdf

PERG Consult Request Form

https://www.albertahealthservices.ca/assets/about/scn/ahs-scn-perg-advisor-request-form.pdf

PERG Weekly Email Submission Criteria

https://www.albertahealthservices.ca/assets/about/scn/ahs-scn-perg-weekly-email-criteria.pdf

The Voice

https://albertahealthservices.us17.list-manage.com/subscribe?u=be4c017acd3e691693c833340&id=9ad743bdb2

Storytelling

AHS Digital Patient Stories:

https://www.youtube.com/playlist?list=PLi1tOF1I5ZoWY3hfrrwu15NTWz8e9amOt

A Storytelling Resource Kit for Patient and Family Advisors
This resource is available on Insite, the AHS intranet. If you don't have access, please contact patientsaspartners.scn@ahs.ca to retrieve a copy.

Patient and Family Storytelling in Healthcare: a Resource Kit for Healthcare Providers
This resource is available on Insite, the AHS intranet. If you don't have access, please contact patientsaspartners.scn@ahs.ca to retrieve a copy.

Supporting advisors

Preventing Advisor Burnout:

https://www.albertahealthservices.ca/assets/about/scn/ahs-scn-perg-preventing-advisor-burnout.pdf

Readiness Checklist for Partnering with Patient and Family Advisors:

This resource is available on Insite, the AHS intranet. If you don't have access, please contact patientsaspartners.scn@ahs.ca to retrieve a copy.

Ways to Include the Patient and Family Voice:

This resource is available on Insite, the AHS intranet. If you don't have access, please contact patientsaspartners.scn@ahs.ca to retrieve a copy.

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