

# Twelve tips for partnering with patients in Continuing Professional Development (CPD)

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## 1) Define your purpose.

- When engaging in patient partnership, it is important to clearly outline your objectives.
- As a team, determine what you want from the patient involvement and what are the outcomes you seek. What is the patient partner (PP)s role?
- Reflect on what meaningful partnership looks like (helps to avoid tokenism).

## 2) Recruiting the correct patient partner(s) for the activity

- Knowing your purpose will guide you in finding the PP that corresponds with your goals and purpose.
- Open communication.

## 3) Pay attention to diversity and inclusion when recruiting patient partners.

- A criticism of patient partnership is that PPs represent a relatively homogenous, often privileged group of people.
- When recruiting from under-represented communities or equity deserving groups, flexibility and creativity may be needed.
- It's important to seek out these voices, ensuring that their involvement does not cause them harm, while also being aware that they may require a different approach.

## 4) Transparency is essential.

- Clearly express your purpose and outline the expectations of the PP.
- What will the PP require for them to be able to participate, and to ensure they are comfortable and feel safe?
- Reimbursement and compensation should be discussed upfront (see tip 12)

## 5) Adequately prepare the PP for their involvement

- Assigning a point of contact person for the PP is essential.
- What is the timeframe and commitment level required, when will meetings be held, how much preparation is needed, etc.
- Make sure you share all appropriate documents, emails, background information, etc. that could help them get a better understanding of the context in which they will be engaged.
- Remember, different PPs come to the engagement activity with different levels of experience (i.e.: a PP who has done numerous CPD activities may require less assistance when getting started, vs a PP who is new to CPD)

## 6) Prepare all other stakeholders for patient involvement in CPD.

- Faculty members and administrative staff may be new to patient partnership, so training and support should be provided.

- This education/training must go beyond knowledge and theory, to include skills and practical application to assist with the creation of both an authentic sense of belonging and engagement but also psychological safety for patient partners.
- 7) When possible, have more than one patient partner involved.**
- Involving more than one patient can help give them confidence and support to participate more meaningfully.
  - Having more than one patient helps to ensure diversity of patient expertise.
  - Helps to ensure continuity of representation.
- 8) When possible, do pre-and-post check-ins.**
- This helps to ensure that PP feels comfortable, and allows them the opportunity to ask additional questions, provide feedback, etc.
- 9) Leadership sets the tone for meaningful and successful patient partnership.**
- Show enthusiasm for patient partnership.
  - Ensure proper introductions of all present
  - Encourage patients' perspectives, while understanding PP communication may look different for various PPs.
  - Be sensitive to the use of jargon and acronyms.
- 10) Provide feedback to patients on outcomes and impact.**
- Provide PP with feedback on outcomes and the impacts of their work, closing the loop both during and after the activity is complete.
- 11) Evaluate your partnership.**
- Evaluation/feedback from both the PP and other stakeholders involved is important to evolve the patient partnering landscape, and to inform future CPD activities.
- 12) Discuss compensation.**
- It's important to bring this up at the beginning of the engagement.
  - Reimbursement is an absolute (i.e.: paid parking, transportation, food, etc.). It should never cost the patient the participate.
  - Compensation shows that PP expertise is valued.
  - Both financial and non-financial compensation can be considered
  - PP may have different needs and preferences, so it's important that you work with them to understand these.

## References

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