Maximizing Stakeholder Engagement for Healthcare Procurement

January 23, 2020
Introductions

Iris Ko, MBA
Kara LeBlanc, M.Sc.
Learning Objectives

- Stakeholder Engagement Benefits
- Stakeholder Engagement Framework
- Patient Engagement Strategies
- Meaningful Engagement
Stakeholder Engagement
Benefits of Building Stakeholder Involvement

- Increase Value
- Build "Social Capital" — Trust, Shared Values, Mutual Understanding
- New Insights and Perspective
- Project Success
Stakeholder Engagement Framework

1. Identify Stakeholders
2. Determine Engagement Objectives and Strategies
3. Analyze and Understand Key Stakeholders
4. Engage Stakeholders
Identify Stakeholders

- Who has a vital interest in your project or what you plan to do e.g. within the circle of care, community partners?

- Who will be involved directly, indirectly or perceived to be affected by the outcome of your work e.g. patients, informal caregivers, care providers?

- Who can make an important contribution to, or influence, the project scope, resources or outcome e.g. decision makers, clinical experts, policy maker and funders?
Stakeholder communities may not be from the same organizations, but could be individuals linked by:

- Issues
- Identity
- Interaction
- Geography
Analyze and Understand Key Stakeholders

- What are their needs and how is the problem affecting them?
- What financial or emotional interest do they have on the outcome of your work?
- What motivates them? What are their concerns and needs?
- What information do they want from you?
- How do they want to receive information? What form of communication do they prefer and how frequently?
## Stakeholders Mapping

<table>
<thead>
<tr>
<th>Stakeholder/ Stakeholder Group</th>
<th>What are their “values”, “interests”?</th>
<th>Attitude towards this issue? Affected (positive/negative)</th>
<th>Desired or preferred solutions, why?</th>
<th>Their Power or Influence (Financial, Policy, Technical, Community Network)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Owner</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Team Members</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lobbying Groups</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Prioritize Stakeholders

- When you are interacting with multiple stakeholders at the same time with limited time and resources, it is important to consider prioritizing your stakeholders based on their interest (I) in the project and the power (P) they hold over the project.

- Stay connected with them to make sure you know when some of them move into other quadrants during the life of the project.
Developing Stakeholder Engagement Strategy

- Identifying the objective of engagement
- Determining when to engage
- Organizing the information that aligns with the stakeholder’s values
Engagement Objectives and Approaches

**INFORM** – TO KEEP INFORMED

**CONSULT** – TO INFORM AND LISTEN TO

**INVOLVE** – TO ENSURE CONCERNS ARE REFLECTED IN SOLUTION

**COLLABORATE** – PARTNER TO MAX. EXTENT POSSIBLE

**EMPOWER** – TO IMPLEMENT WHAT WAS DECIDED TOGETHER

Power Sharing
# Developing Stakeholder Engagement Strategy Example

<table>
<thead>
<tr>
<th>Inform</th>
<th>Consult</th>
<th>Involve</th>
<th>Collaborate</th>
<th>Empower</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem / Need Identification</td>
<td>All staff, including clinical, within the organization</td>
<td>Patients, families, others in circle of care</td>
<td>Impacted staff within the organization</td>
<td></td>
</tr>
<tr>
<td>Market Analysis</td>
<td>Supplier community</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Designed Desired Outcomes</td>
<td></td>
<td>Patients, families, others in circle of care</td>
<td>Impacted staff, executives within organization</td>
<td></td>
</tr>
<tr>
<td>Proposals Evaluation</td>
<td></td>
<td></td>
<td>Multi-disciplined evaluation team</td>
<td></td>
</tr>
<tr>
<td>Piloting and Prototyping</td>
<td></td>
<td>Patients, families, others in circle of care</td>
<td>Patients, families, others in circle of care</td>
<td></td>
</tr>
</tbody>
</table>
Communication Principles

1. Stakeholders should feel that they were heard
2. Participants need to see how their inputs were considered or adopted
3. Process should be built on Trust. Offer only what you can deliver and manage expectations
4. Use generic terminologies and common languages

HEALTHCARE Supply Chain Network
Stakeholder Engagement Framework

1. Identify Stakeholders
2. Determine Engagement Objectives and Strategies
3. Analyze and Understand Key Stakeholders
4. Engage Stakeholders
Interactive Touchpoint

- What are a few examples of challenges or successes that you have encountered when engaging stakeholders?
Patient Engagement
Patient Engagement Approaches

**Inform**
To keep the patient community connected at different points of the project using newsletters, posters, open house, etc.

**Consult**
To validate “needs” and “values” and acknowledge concerns while developing procurement document through surveys, interviews/meetings and focus groups, etc.

**Involve**
To work with patients in solution development pre and post procurement through forms of focus groups, advisory committees, etc.
NHS United Kingdom Experience Based Design (EBD)

Capture patient experience– e.g. Experience Questionnaire

Understand the experience

Improve the experience

Measure the improvement
Tools for Capturing the Patient Experience

- Observation/Photography
- Interviews/Meetings
- Focus Groups
- Story Boards
- Diaries
- Experience Questionnaires
Experience Questionnaire - Patients

How do you feel?

This experience questionnaire will help you think about how you feel at different stages in your journey.

Circle the words that best describe your feelings at each stage, or write your own words at the bottom.

See pages 54-55 for more information on experience questionnaires.

Why?

We'd like to know why you felt like this. Was it friendly staff, a nice conversation, or a long wait — whatever it is we'd like to know.

© NHS Institute for Innovation and Improvement 2009
Understanding the Patient Experience

1. Identify Emotions
2. Identify the Touch Points (points along the journey that are identified as positive or negative emotionally)
3. Map the Emotions to the Touch Points and identify the underlying triggers
4. Bring together perspectives from health providers and patients
Linking Patient Engagement to Procurement Processes

**Procurement Process Flow**

- Identify Need
- Market Analysis
- Plan & Build RFx Questions
- Prepare/Post Procurement Document
- Bid/Proposal Evaluation
- Negotiate Contract Terms and Award Contract

**Evaluation Criteria Considerations**

- Patient experience
- Patient comfort
- Patient choice
- Clinician/user experience
- Clinician ease of use and safety
- Clinician and system process improvement
  - Performance guarantees
  - Implementation support
  - Ongoing service support
  - Clinical training, education
Meaningful Engagement - Pre & Post RFXs

**Clinical inputs**
- Procurement to do clinical tours or view procedure to understand bigger impact on patient care.
- Procurement to share value strategies, guide teams in developing generic questions.

**Supplier participation**
- Responses to RFXs can affect engagement – outcome of the process.
- Answering questions clearly, providing for site visits or clinical demos.
- Dialogue and open communication.

**Patient Involvement**
- Determine if patient needs to be involved.
- Ensure patient safety is at forefront of decision-making.
- Determine if patients provide input in development of questions, or clinical evaluations, or both.

**Post Implementation Support**
- Stakeholder engagement beyond the award of the RFX is critical.
- In order to realize results of patient involvement or in-depth clinical trials, ongoing support from suppliers is key to success for clinical programs.
Interactive Touchpoint

- Can you share examples where you engaged patients and/or clinicians in procurement process, and impact post-RFX award?
Questions
Thank you

irisko_ca@yahoo.com
kara.leblanc@snb.ca
Join us for our Upcoming Webinar

Thursday February 20th, 2020

PERFORMANCE METRICS, BENCHMARKING & REPORT CARDS

PRESENTERS:
David Loukras, Provincial Director, Supply Chain Performance
Surinder Bains, Manager Warehousing & Logistics, PHSA
Elise Tiessen, Sr Operations Analyst, PHSA