Best Practices Innovation Collaborative

Incorporating Patients as Members of the Team

Sally Okun, Steve Schoenbaum

Co-chairs, Working Group

Diedtra Henderson

IOM, Program Officer

March 27, 2014

INSTITUTE OF MEDICINE
OF THE NATIONAL ACADEMIES

Background

- **Oct 2012, IOM released *"Core principles & values of effective team-based health care"***
  - Identified core principles & values considered essential for effective team-based care
  - Held "reality check" interviews with groups known for delivering team care across diverse settings
  - Patients & families not included in interviews
- **Feb 2013, IOM convened working group to explore:**
  - How can teams best work with and for patients/families?
  - Do core principles & values resonate with and/or apply to patients/families?
  - Appropriate methods for seeking input from patients/families

Incorporating Patients as Team Members Work Group

Co-chairs:
- **Sally Okun**
  PatientsLikeMe, Co-chair
- **Stephen C. Schoenbaum**
  Josiah Macy, Jr. Foundation, Co-chair

Literature Review:
- **Veronica Chollette**
  National Cancer Institute
- **Pamela H. Mitchell**
  University of Washington
- **Melissa A. Simon**
  Northwestern University
- **Dale Strasser**
  Emory Healthcare
- **Richard Ricciardi**
  Agency for Healthcare Research and Quality
- **Matthew K. Wynia**
  American Medical Association

Current Knowledge:
- **Veenu Aulakh**
  Center for Care Innovations
- **Preeta Chidambaran**
  Health Resources and Services Administration
- **Wendy L. Prins**
  National Quality Forum
- **Melissa A. Simon**
  Northwestern University
- **C. Edwin Webb**
  American College of Clinical Pharmacy

Data Collection:
- **David Andrews**
  Georgia Regents Medical Center
- **Jessie Gruman**
  Center for Advancing Health
- **Sandra Leal**
  El Rio Health Center
- **Beth Lown**
  Schwartz Center for Compassionate Healthcare
- **Carly Parry**
  National Cancer Institute
- **Ron Stock**
  Oregon Health & Science University

INSTITUTE OF MEDICINE
OF THE NATIONAL ACADEMIES

Advising the nation • Improving health

Initial Thoughts About Organizing the Work

- Overarching objective of incorporating patients/families into teams is to achieve the Triple Aim & engagement

- Principal objectives of the working group:
  - Gain **new knowledge** about patient/family perception of team-based care & their own place on the team
  - Find examples of **high-quality team-based care** and conduct structured interviews to gain insights
  - Summarize knowledge about **team science and identify gaps**
  - Describe the **types of health care teams** in specific use cases and settings of care
  - Identify top 3-5 **barriers** that, unless addressed, will significantly impact the "promise" of team-based care in achieving the Triple Aim & patient/family engagement

The Actual Process to Date

- **Developed 3 subgroups:**
  - **Literature Review**
    - What is known about team science that relates to incorporating patients (or clients) into teams?
    - Ethical issues relating to patient-team interactions
  - **Provider Organization Interviews (Current Knowledge Subgroup)**
    - Workgroup members conducted 14 semi-structured interviews with persons from organizations that believe they have team-based models of care that interact effectively with patients or organizations interested in promoting team-based care
    - Objective: explore how health care team reconfiguration, processes, and technology have supported patient engagement
  - **Patient Interviews (Data Collection Subgroup)**
    - Grant from the Gordon and Betty Moore Foundation allowed a trained interviewer to do 15 structured interviews of patients about their experiences of team-based care
    - Intentional cross-pollination to ensure patients and providers from the same organizations were interviewed

Working Group Activities

- **Frequent subgroup conference & overall work group calls**
  - Excellent participation!
    - Several WG members are here today to participate in this discussion
- **Literature Review – extensive, largely lacking**
  - Incorporating patients into teams or partnering with health care teams has not been studied
  - Parallels (e.g., clients) have not been explored
- **Preliminary results of interviews**
  - Too early to present to you
  - Results are likely to lead to some important considerations about forming a strong relationship between patients and their health care teams
  - Results are likely to lead to a set of questions for investigation

Next Steps

- **Complete all data collection**
- **Summarize findings**
- **Develop a report**
  - Note the outline for the report in your packet for today's meeting. It includes:
    - Rationale
    - What is already known
    - What we have learned
    - What needs to be done
      - Develop a set of research priorities

Discussion

- **Work group members**

- **General discussion**