Chapter 2:
Engage Key Stakeholders

With any new initiative, it is important to engage stakeholders who have an interest in the success of the project. Involving people who will be impacted by the initiative can lead to strong support of the project and can strengthen the process and/or outcomes of the project. For example, engaging staff can lead to the development of more appropriate workflows to collect and act on the socioeconomic data; engaging patients can lead to more appropriate interventions or community partnerships.

There are many ways to engage stakeholders, ranging from education and consultation to direct involvement in the project process. Some stakeholders may desire and have the capability of engaging in a more active and direct way, such as helping to define priorities, collect the data, interpret the findings, act on the data, develop community advocacy plans, etc. Other stakeholders may desire or only have the capability of engaging in a more passive way (advise at meetings, providing feedback, etc.). What is important is engaging and educating stakeholders so that they can make an informed decision as to how they would like to be engaged.

This chapter includes messaging materials to help engage stakeholders and to address common questions and concerns. It also includes best practices in engaging stakeholders.

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Messaging Materials for Staff and Patients on the Importance of Collecting Data on the Social Determinants of Health

Engaging stakeholders begins with messaging. Before asking staff, leadership, and patients to collect and provide personal and sensitive information, it is important to educate all stakeholders on the importance of collecting data on the social determinants of health and how that information will inform care and services. It is also important to emphasize how this work adds value to other work in which the organization is involved so that it does not come across as an isolated one-off project but one that fits into the organization's larger, overarching goals. Presented below are common questions our pilot testing health centers received from their staff and patients and examples of messages the health center project champions provided to address those concerns. Messages varied across the pilot teams depending on their particular setting and situation.

Common Question: Why Are We Asking Our Patients About Their Socioeconomic Situation?

Messaging Solution:

The message should emphasize that collecting data on the social determinants of health will help the organization better understand their patients and their patients' needs to provide better care.

Develop a short script using the message above for staff administering PRAPARE to provide context to patients before beginning the PRAPARE assessment.

Examples of Scripts for Patients to See or Hear Before Answering PRAPARE Questions:

"We would now like to ask you some non-medical questions to better understand you as a person and any needs you may have. We want to make sure that we provide the best care and services possible to meet your needs. This information will help us determine if we need to add new services or programs to meet the needs of our patients.

This information will be kept private and secure. Only clinic staff will have access to this information. Your decision to answer or to refuse to answer will NOT impact your ability to receive care. In many cases, this information will help us determine if you are eligible for any additional benefits, programs, or services.

Please let us know if you have any questions, concerns, or suggestions."

Common Question: How Do We Fit PRAPARE into Our Workflow Without Increasing Visit Time?

Messaging Solution #1:

Utilize time when the patient is either waiting to be roomed in the waiting room, waiting for the provider in the exam room, or after the clinical visit, to administer PRAPARE so as not to disrupt the clinic visit.

Messaging Solution #2:

Incorporate PRAPARE into other assessments (such as Health Risk Assessments, Depression Screenings, etc.) to encourage completion and to address similar needs or concerns raised by the assessments.

Common Question: How Do We Add Another New Initiative to Our Already Full Schedules and Responsibilities?

Messaging Solution #1:

Don't market PRAPARE as a new big initiative but rather as a project that aligns with other work your organization is already doing (care management, enabling services, Accountable Care Organization (ACO) planning, etc.) and how PRAPARE adds value to that work.

Messaging Solution #2:

Move the conversation on PRAPARE organically rather than forcing a new project. Be in the right place at the right time to make small changes and nudges as "People's attention is a commodity."

Emphasize that collecting this information will help inform care, services, and community partnerships that will hopefully improve your patients' and organization's health outcomes.

Common Question: What If We Do Not Have the Resources or Services to Address the Social Determinant Needs Identified? What Do We Do?

Messaging Solution:

Explain that "the organization has to start somewhere" and data collection is that first step. Collecting data on the social determinants of health will help the organization figure out which services it can provide in-house to which patients to hopefully improve outcomes by uncovering the root causes of health conditions and health behaviors. For services that the organization cannot provide in-house, this data will help inform which community organizations with which it should partner to provide needed services. Until then, the organization will do the best that it can to address the social determinants needs raised by PRAPARE with what it has.

Sample Action Steps to Engage Stakeholders

What follows are some example steps an organization can take to engage stakeholders, from staff to leadership to patients, based off of lessons learned from PRAPARE health center pilot sites.

Step 1: Educate Staff, Board, and Patients and Gather Feedback

Educate staff informally through conversations and internal meetings to gather support and feedback.

Give presentations to executive leadership and the board to highlight the ways PRAPARE aligns with existing organizational priorities and how data on the social determinants of health will add value to other organizational initiatives.

Engage community leaders to understand patients' and the community's attitudes towards being asked about their socioeconomic circumstances. Ensure that community leaders understand that gathering this information is meant to help the organization better understand its patients and to provide them with more appropriate, needed services and care.

Allow staff and patients to ask questions and to participate in the planning process. Their engagement will likely lead to more effective workflow models to collect and respond to social determinants data. Engaging different types of staff and patients early-on in the planning process may also highlight potential implementation challenges and ways to overcome those challenges.

Step 2: Launch PRAPARE at an All-Staff Event and Recruit Volunteers

Once support has been secured from leadership, educate staff at all levels through a broad overview presentation at an all-staff meeting highlighting the importance of this work and how it aligns with the organization's larger goals. It is important that everyone understands the benefits of PRAPARE.

Ask for volunteers at this meeting--advocating for a "no wrong door" approach in which each and every staff can play a part in helping to "paint a fuller picture of the patient".

Accept all volunteers, even if they are not members of the staff group initially intended to collect data (e.g., case managers, social workers, etc.) as they may become some of the most successful data collection and response staff due to their personal motivation or connection to this issue. At one of the PRAPARE pilot sites, one outreach and enrollment coordinator collected data on over 300 patients in just three weeks due to her ability to build trusting relationships with the patients and noticing when they would be waiting to be roomed or to see the provider.

Step 3: Train Staff and Identify Project Champions

Provide detailed training and education for all volunteer and assigned PRAPARE data collection and response staff. (For sample training curriculum, see Chapter 5: Workflow Implementation.)

Identify project champions to help keep the health center motivated based on their passion for the social determinants of health. Champions can be any staff but usually those that have good relationships with patients and other staff.

Step 4: Design Ways to Engage Patients in the PRAPARE Process

It is important to engage and educate patients from the beginning so that they understand why the clinic is asking them to provide this information and how it will ultimately benefit them with more appropriate and needed services.

In the opening message to patients (either written or spoken), do not call PRAPARE an "assessment" but rather a "conversation starter" to invoke that these questions are meant to build better relationships between patients and staff and to inform the process to better care. Use empathic inquiry, talk story, or motivational interviewing techniques to talk compassionately and reflectively with patients. (For more information on these data collection techniques, see Chapter 5: Workflow Implementation. For a demonstration of the empathic inquiry method, view this video developed by the Waianae Coast Comprehensive Health Center).

Patients can be involved in the PRAPARE process in the following ways:

- Gather feedback from patients on this opening "script" message and PRAPARE in general to see if they have any remaining concerns or input on how to tailor the message to different communities.

- Ask patients to participate in the "PRAPARE Huddle" meetings (see Step 5 below) to see if the results of the data collected resonate with them, to advise on overcoming data collection challenges, and to provide suggestions on how to address the needs identified.

- Engage patients in enhancing the community resource guide to ensure that it contains the most relevant, trusted, and helpful resources.

- Visit homes and neighborhoods of patients to witness how the social determinants of health affect the community.

- Engage patients in community advocacy for change.

Step 5: Plan Opportunities for Shared Learning

Plan mechanisms, such as weekly "PRAPARE Huddle" meetings, to allow data collection staff to regularly share their successes and challenges in collecting data, to check-in on progress in meeting project goals, and to discuss the socioeconomic needs that have been identified and whether the organization has the resources or capabilities of addressing those needs in-house or if it should examine partnerships with other community organizations.

These regular meetings are also a good opportunity to have patients describe their experiences with PRAPARE and to discuss ways to improve the data collection and response process.

Step 6: Develop Resources with Staff and Patient Input

Develop a script for introducing PRAPARE to patients with patient and staff input as to the language and tone used.

Create or enhance a list of resources or "Community Resource Guide" that maps to PRAPARE-identified assets, risks, and experiences. Engage a wide variety of staff and patients in developing this resource as they may be knowledgeable about resources available in the community. If local resources do not exist, provide national resources or online links.