THE CHANGE FOUNDATION

A Checklist of Considerations to Leverage an Experience-Based Co-Design Approach

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Phase Two: Discovery – Collect Staff & Provider Experiences

Phases two and three of the experience-based co-design (EBCD) approach are focused on collecting experiences to understand the current environment and identify areas for improvement. Phase two involves engaging with staff and providers to listen and learn about their experiences, while phase three is focused on understanding the experiences of patients/clients, and family caregivers. By engaging with different population groups, the Discovery phases enable an opportunity to holistically assess the current landscape from every angle.

Both phases of Discovery can occur in parallel (e.g., they do not need to be staggered). If you plan on using focus groups to engage with staff, providers, patients and caregivers, conduct these sessions separately (e.g., one session with staff and providers, another for patients, another for caregivers) to ensure the information gathered is reflective of the individual's personal experience. For example, patients may not candidly share an experience if providers or their caregivers are in the room.

If you have recruited someone who wears more than one hat (e.g., a provider who is also a caregiver), ask them to participate based upon the predominant hat they wear (e.g., a full-time provider who is also a caregiver would be included as a provider).

The following checklist outlines 10 considerations to help you plan and execute the Discovery phase with staff and providers. You do not need to complete the identified tasks in the order they appear – you will find several tasks will occur in parallel or evolve from others.

1

Develop a recruitment plan that, along with identifying the target audience and approach, addresses how an equity lens will be applied to engage with diverse voices.

How will you identify potential staff and providers?
Remember you want to engage with staff and providers who have experience in the area (e.g., unit, program) you are looking to improve. To help you identify potential staff and providers, ask the project's executive sponsor to connect you with managers in the organization who can socialize and help prioritize the project among unit/program staff and providers. As you begin your efforts to recruit, you will come across both supportive and unsupportive staff and providers. It is important to engage with those who oppose the project to be able to understand their perspectives and hopefully address them to gain their support.

What will your recruitment efforts look like?

- How will you target communications to reach staff throughout the organization – will you need something different for front-line staff vs. senior leaders?
- Are there regular meetings that take place that you can join (e.g., huddles, team meetings, Leadership Development Institute (LDI) days) rather than schedule separate new meetings?
- What enablers may be required to support staff participation (e.g., backfill)? Are there any other barriers that senior leaders can support in removing?

Who will be the point of contact (from the team) for staff and provider participants?

2

Draft some key messages (e.g., a project brief) about the initiative that are clear and concise to assist with recruitment.

Consider including:

- A project description to foster a common understanding of the project and define scope.
- An explanation of how the project aligns with the organization's strategic priorities and vision.
- What EBCD is and why the project team is using the methodology?
- The benefits of participation to staff and providers (e.g., what does it mean for them?).
- A description of the Discovery phase. Share what you are hoping to learn by engaging with staff and providers, the methods of engagement (e.g., interviews), which staff and providers should be part of the engagement, the time commitment and the dates for engagement.

3

Create a data collection plan that considers the capacity of staff and providers to participate and how the time and place may impact staff and providers.

Be mindful of competing priorities (e.g., flu season, accreditation). Try to schedule the Discovery phase during a time that staff and providers will be able to participate. Offer a variety of opportunities to participate in the Discovery phase by using a mix of approaches – surveys, focus groups, interviews and observation to engage with staff and providers.

4 Compose the survey, interview or focus group questions.

The first question that often comes to mind when composing questions is “how many?”. To help answer this, think about what time staff and providers will likely be able to commit to. Generally, senior leaders, management and physicians typically can offer 30 minutes while other staff and providers may be able to comfortably offer 45 to 60 minutes. For engagements that are lengthier (e.g., focus groups), you may need to work with the unit/program manager to sort out back-fill.

Balance your questions – build in broad questions that enable a pulse check and then move to more specific questions about the project’s area/theme of focus. Think about questions that help to understand perception and experience. After a few responses if you find staff and providers are having trouble responding to a question or interpreting a question differently than intended, try re-wording it. This is not a research study so allow yourself the flexibility to adjust questions as you go and be creative about getting input.

When multiple engagement methods are used (e.g., surveys and interviews), the questions do not need to be identical. Rather, begin with the surveys, assess the data and identify how the interview can offer greater richness in areas of ambiguity found in the survey data. Below are some additional considerations.

Surveys

When building a survey, the time it takes to complete it is crucial. Research shows that on average, the more questions in a survey the less time respondents spend answering each question.

To build engagement and minimize respondent fatigue consider a survey that takes 5 to 15 minutes to complete, asks 8 to 10 questions and incorporates multiple response options (e.g., Likert scale, short answer). If you are looking for rich information, consider interviews instead.

Interviews

Interviews typically range from 30 to 60 minutes. Consider 6 to 10 core questions with 1-2 prompts and/or probe questions.

Focus Groups

Focus groups can vary in length, size and how they are conducted (e.g., in-person, online). To build an engaging, enjoyable and productive session consider using activity-oriented questions and building exercises to gain insights about the experience of staff and providers as opposed to simply asking direct questions.

5

Schedule time in the calendars of staff and providers who will be participating in the Discovery phase as early as possible.

The schedules of staff and providers especially providers fill up quickly. Where possible book 4-6 weeks ahead of the engagement (e.g., focus group) to facilitate their participation.

If you are using surveys to collect experiences work with staff and providers to block off time in their calendar (e.g., book 30 minutes in the calendar as a hold). This reduces the likelihood of staff and providers over-committing themselves.

6

Plan for the engagement.

In planning for Discovery engagements, be creative – think outside of the box. For example, if you experience a low survey response rate, try hosting a breakfast or lunch for staff and providers and ask them to complete the survey while enjoying the provided meals/snacks, or walk around the unit with an iPad that has the survey loaded.

Below are some considerations to support you in planning for the engagement approach you will use (e.g., surveys, interviews). You may have already answered some of these questions in your data collection plan.

Surveys

- How long does it take to complete the survey?
- Are the surveys web-based, paper-based, or electronic (e.g., PDF)?
    - Are there any concerns from an organizational privacy perspective if using web-based surveys (e.g., SurveyMonkey)? If so, what are the parameters?
    - If paper-based, how will the surveys be collected?
- How will the surveys be distributed (e.g., email, hosted sessions)?
    - If via email, who will be sending the email? Consider having someone from senior management on your project team send the email.
- How long do staff and providers have to complete the surveys? Be mindful of competing priorities and schedules. Enable at least 2 weeks for a turn around time.
- What is the follow-up process to remind staff and providers to complete the surveys? Recognizing that you may not hear back from everyone within the time period you set, allow some buffer time in your project timelines to allow them to respond.

6

Plan for the engagement (continued).

Interviews

- Does the organization have consent forms that can be modified?
- Will the interviews take place in-person, via phone or through video-conferencing platforms (e.g., Zoom, Microsoft Teams)?
  - Are there any accessibility or technology considerations?
  - If in person, will coffee and snacks be provided?
  - Do you need a trial run to ensure speakers, microphones and video are all working?
- Will a brief with the interview questions be sent ahead of time?
- Will the interviews be recorded?
  - How and where will the interview files be housed?
  - Who will have access to the interview files? How is access obtained?
  - Who will be transcribing the interviews?
- Who will be conducting the interviews?
  - Are the questions on a sensitive topic that you may need to offer support post interview (e.g., counsellor)?
- Consider an external interviewer?
  - Does the interviewer require any training or support?
- What supports are available should staff and providers require them (e.g., social worker, counsellor)?
- If multiple interviewers are conducting the interviews, will a huddle be organized to address any questions/concerns?
- How will the interviews be analyzed/coded?

6

Plan for the engagement (continued).

Focus Groups

- Does the organization have consent forms that can be modified?
- Will the focus group take place in-person or through video-conferencing platforms (e.g., Zoom, Microsoft Teams)?
    - Are there any accessibility or technology considerations?
    - If in person, will snacks/meals and coffee be provided?
- Will the focus groups be recorded?
    - How and where will the recorded files be housed?
    - Who will have access to the recorded files? How is access obtained?
    - Who will be transcribing the focus group recording?
- Who will be the facilitator(s) and recorder(s)?
    - Is an external facilitator required?
    - Do facilitators require any training or pre-huddles?
    - Will there be table facilitators and recorders?
    - What will recorders be taking notes of? Do recorders need any training or pre-huddles to ensure consistency in capturing discussions and dialogue?
- Setting the agenda:
    - Will be there break-out sessions?
    - Are wellness breaks included? If conducting a video-conference, how can you support participants in taking a wellness break (e.g., 5-minute chair yoga, meditation)?
    - What questions can be executed as activity-oriented questions (e.g., exercises)?
        - How and who will collect the materials from the activities?
    - If conducting the focus group as a video-conference, do any materials need to be sent to participants to participate in the session?
- Do you have a plan on what to do when managers, supervisors, or other staff show up at an engagement session when they were asked not to?
- What supports are available onsite should staff and providers require them (e.g., social worker, counsellor)?
- Will any pre-reading/session materials be sent to focus group participants?
- If multiple facilitators are conducting the focus group, will a huddle be organized to address any questions/concerns?
- How will the interviews be analyzed/coded?

7

Leverage the opportunity in your engagement with staff and providers to identify potential folks who want to stay involved in the project.

Are there staff or provider participants who are passionate about the work you are doing? Would they be willing to stay engaged? Could they take on the role of a ‘champion’?

8

Complete an analysis of the Discovery phase findings from staff and providers to identify common themes and topics that have emerged.

If you have used mixed approaches, you likely will be able to augment survey data with findings from interviews or focus groups to gain additional insights. After completing the analysis if you find there are areas where you need additional input, conduct a follow-up engagement with the staff and providers you engaged to dig deeper into those elements.

9

Share the findings back with the staff and providers that participated.

What did you learn from the engagements during the Discovery phase? This is an opportunity to validate the findings and build engagement as you move forward to the next phase. Consider developing a Discovery phase report that captures the narrative of and bridges “what was heard” from engagement participants with “what is being done”. Sharing back the findings and next steps helps with informing staff and providers how their participation has influenced the project (e.g., identification of priority areas) and is a best practice in community engagement.

10

Create a communication plan to continue to share regular updates with the staff and providers that you engaged with during the Discovery phase.

Maintaining communications helps to socialize the project, keep the project 'top of mind', identify and support champions and identify new opportunities along the way.