

	POLICY Number: 7311-20-016 Title: Client and Family Centred Care – Sponsored Community Participants
Authorization <input type="checkbox"/> President and CEO <input checked="" type="checkbox"/> Vice President, Finance and Administration	Source: Vice President Lead, Client and Family Centred Steering Team Cross Index: Date Approved: July 10, 2009 Date Revised: Date Effective: August 7, 2009 Date Reaffirmed: Scope: SHR

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DEFINITIONS

Client means a person who experiences services provided by SHR.

Family means individuals who are connected by kinship, affection, dependency or trust.

Client and Family Centred Care puts clients and family members at the center of all we do together. Client and Family Centered Care embraces respect and dignity, collaboration, information sharing and meaningful participation.

Sponsored Community Participant means a client/family member or any member of the public who wishes to be involved in SHR. There are four types of Sponsored Community Participants within SHR:

One-Time Contributor means a client/family member or any member of the public whose participation is of a one-time nature such as a response to a survey or other evaluation activities (ie. focus group) or an individual asked to speak on a one time occasion for educational purposes about their experience with the health care system.

Occasional Reviewer means a client/family member or any member of the public who is asked to review or discuss specific issues at various points in the improvement process; on an ad hoc basis (including working groups/action teams); depending on the activity the community participant may review and advise in person, through email, or an interactive online forum, over the telephone, or in a written format.

Advisory Council Member/Steering Team Member/Committee Member means a client/family member or any member of the public who becomes a member of an advisory council/steering team/committee (that has formal Terms of Reference); acts as a resource to the improvement initiative; the community participant assists in the planning, implementation and evaluation of various projects; this type of involvement is more of a partnership opportunity.

Co-Leader means facilitator, content expert, evaluator, faculty or author; represents a very high level of involvement and requires adequate skills and knowledge; previous work/education is valuable; community leadership experience may be considered; experience serving as an effective advisor with the practice or program can offset a lack of relevant professional/educational experience.

SHR Sponsor means any SHR employee, professional staff or practitioner staff.

1. PURPOSE

The purpose of this policy is to standardize SHR's approval, recruitment, registration, and orientation requirements for engaging community participants.

2. PRINCIPLES

- 2.1** SHR is committed to putting Clients and Families at the centre of care and service, recognizing them as integral members of our organizational team(s), and providing leadership in promoting, maintaining and evaluating Client and Family Centred Care.
- 2.2** Community participation is essential to the design and delivery of optimal health care services.
- 2.3** Sustained community participation is essential to SHR's ability to respond to the real needs and concerns of those it is intended to serve.

3. POLICY

- 3.1** SHR prioritizes and endorses community participant involvement in SHR committees, teams and projects.
- 3.2** SHR's approval, recruitment, registration and orientation requirements for Sponsored Community Participants are summarized in Appendix A, which forms part of this policy.

Approval

- 3.3** Advisory Council Members/Steering Team Members/Committee Members and co-leaders must be approved in writing and be assigned an SHR Sponsor. The minimum required approval level is the Director/Professional Leader or designate.
- 3.4** SHR Sponsors must complete a *Criminal Records Check Risk Assessment* (Appendix B) for potential Advisory Council Members/Steering Team Members/Committee Members and Co-leaders. Criminal Record checks are obtained at the expense of SHR and:
 - 3.5.1** must be dated within the past six months.
 - 3.5.2** must be obtained from a recognized law enforcement agency (ie. RCMP or local police service).
 - 3.5.3** may require consultation with an SHR Staffing Consultant.

Recruitment

- 3.5** SHR will recruit in an open, fair and equitable manner.
- 3.6** Methods of recruitment must be suitable to the intended recipients and reflect an engaging message.
- 3.7.1 Acceptable methods of recruitment include referrals (direct invitation from staff and/or existing participants) and advertisements (self applicant).
 - 3.7.2 Other methods of advertisements may include, but are not limited to, posters, newspaper ads and advertising via SHR's internal and/or external websites. All advertisements must be in compliance with SHR's *Visual Identification Guidelines* see Appendix C - Sample Recruitment Poster).
- 3.7** SHR staff shall not provide names of specific clients/family members to other SHR staff unless verbal or written consent is obtained from the client/family member; however SHR staff may encourage the client/family member to contact the committee/team/group/chair if interested.

Registration

- 3.8** Advisory Council Members/Steering Team Members/Committee Members and Co-Leaders must be registered with SHR prior to participation (see Appendix D - Registration Form).

Orientation

- 3.9** SHR Sponsors shall orientate Sponsored Community Participants to the SHR team, committee or project (see Appendix A and Appendix E- Sample Orientation Guidelines).

Limitation of Liability

- 3.10** Advisory Council Members/Steering Team Members/Committee Members and Co-Leaders shall be covered by SHR liability insurance for the duration of their assignment with SHR.
- 3.11** SHR reserves the right to terminate any relationship with a Sponsored Community Participant as a result of the following circumstances:
- actions or conduct, which in the opinion of the approval authority, is not appropriate and/or
 - failure of a Sponsored Community Participant to fulfill agreed upon obligations/commitments.

4. ROLES AND RESPONSIBILITIES

4.1 SHR Directors/Professional Leaders or designates

- 4.1.1 Approve Sponsored Community Participant involvement.
- 4.1.2 Review applications of interested individuals and select the Sponsored Community Participant.
- 4.3.3 Determine the skills and qualifications of Sponsored Community Participants.

4.2 All employees, Practitioner Staff and Professional Staff

- 4.2.1 Determine where involvement of Sponsored Community Participants would benefit their portfolio/department.
- 4.2.2 Recruit, register and orientate Sponsored Community Participants.
- 4.2.3 Communicate to Sponsored Community Participants expectations of their involvement.
- 4.2.4 Orientate Sponsored Community Participants to the team, committee or project.

5. POLICY MANAGEMENT

The management of this policy including policy education, monitoring, implementation and amendment is the responsibility of VP Lead, Client and Family Centred Steering Team.

6. NON-COMPLIANCE/BREACH

SHR staff that engage members of the public, clients and/or family members in SHR operations outside the parameters of this policy puts SHR at varying degrees of risk. Non-compliance of this policy will result in a review of the situation.

7. REFERENCES

Framework for Patient and Family Involvement in Quality Improvement. Institute for Family Centred Care 2005
Selecting, Preparing and Supporting Patient and Family Advisors in Primary Care, Institute for Family Centred Care 2005

PROCEDURE

Number: 7311-20-016

Title: Client and Family Centred Care – Sponsored Community Participants

Authorization

- President and CEO
- Vice President, Finance and Administration

Source: Vice President Lead, Client and Family Centred Steering Team

Cross Index:

Date Approved: July 10, 2009

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Date Reaffirmed:

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Scope: SHR

1. PURPOSE

The purpose of this procedure is to establish the process for approval, recruitment, registration, and orientation of Sponsored Community Participants.

2. PROCEDURE

Approval

2.1 Obtain approval as required (see Appendix A).

2.2 SHR Sponsor determines possible skills and qualifications of potential Sponsored Community Participants; may be done in consultation with SHR Director/Professional Leader or designate.

Recruitment

2.3 SHR Sponsor determines recruitment method.

2.3.1 Referrals

SHR staff shall not provide names of specific clients/family members to other SHR staff unless verbal or written consent is obtained from the client/family member; however SHR staff may encourage the client/family member to contact the committee/team/ group/chair if interested.

2.3.2 Advertising

Ensure any other method of advertising (posters, newspaper ads and advertising via SHR's internal and/or external websites is in compliance with SHR's Visual Identity Standards. (see Appendix C- Sample Recruitment Poster). Contact Corporate and Public Affairs if uncertain.

2.4 SHR Sponsor receives applications and forwards to the Director/ Professional Leader or designate for review and selection.

- 2.5** Director/Professional Leader or designate reviews applications and makes selection based on agreed upon predetermined skills and qualifications.
- 2.5.1 If the Sponsored Community Participant is an Advisory Council Member/Steering Team Member/Committee Member/Co-Leader, conduct a *Criminal Records Check Risk Assessment* (Appendix B).
- 2.5.2 If required, ask participant to obtain a Criminal Records Check.
- 2.5.3 If there is any doubt as to the acceptability of a criminal record check, contact an SHR Staffing Consultant.

2.6 SHR Sponsor advises the Sponsored Community Participant of the responsibilities and privileges associated with the role. A fact sheet containing the following information, as relevant, can be prepared and offered to individuals who are considering participation:

- Mission and goals of the project.
- Expectations for their participation.
- Meeting times, frequency, and duration.
- Travel dates.
- Expectations for communication among team members between meetings (including means of communication – email, mail, phone, etc.).
- Time commitment beyond meeting times.
- Compensation offered.
- Benefits of participation (i.e., what are the expected outcomes of their involvement).
- Training and support to be provided.
- Confidentiality information/requirements.

2.7 Registration

- 2.7.1 Registration for One-Time Contributors and Occasional Reviewers is not required.
- 2.7.2 If the individual is an Advisory Council Member/Steering Team Member/Committee Member or Co-Leader, the SHR Sponsor registers the individual with SHR.
- 2.7.2.1 Complete the Registration Form (Appendix C); attach Criminal Records Check Risk Assessment, and if applicable, the original Criminal Records Check.
- 2.7.2.2 Forward to the administration support person assigned to the VP Lead, Client and Family Centred Steering Team. The data is entered in an electronic information management system to support tracking of Client and Family Centred Care registration activities.
- 2.7.2.2 Provide individual with a copy of SHR Policies as stated in Section 6 of the Registration Form.

2.8 Orientation

SHR Sponsor provides Sponsored Community Participant with an Orientation to SHR and/or their agreed upon assignment (see Appendix A and Appendix E).

3. PROCEDURE MANAGEMENT

The management of this procedure including procedures education, monitoring, implementation and amendment is the responsibility of the VP Lead, Client and Family Centred Steering Team.

4. NON-COMPLIANCE/BREACH

SHR staff that engage members of the public, clients and/or family members in SHR operations outside the parameters of this procedure put SHR at varying degrees of risk. Non-compliance of this procedure will result in a review of the situation.

5. REFERENCES

SHR Policy *Client and Family Centred Care – Sponsored Community Participants*

APPENDIX A

Sponsored Community Participant Requirements

Type	Approval	Recruitment	Criminal Record Check Risk Assessment	Registration	Orientation ¹
One-Time Contributor	N/A	Referral Advertisement	Not Required	Not Required	Provide information about individual's role, expectations and/or the evaluation's purpose as relevant.
Occasional Reviewer	N/A	Referral Advertisement	Not Required	Not Required	One-to-one orientation of the team, committee, project; specific to the scope of work
Advisory Council Member / Steering Team Member/ Committee Member	Director/ Professional Leader or designate	Referral Advertisement	Required	Required	Orientation to the mission, goals, and priorities of the team. The importance of privacy and confidentiality. Client and Family-Centred Care Policy(ies) Orientation to relevant SHR Policies ² Any other specific skills and knowledge needed to be an effective team member.
Co-Leader	Director/ Professional Leader or designate	Referral Advertisement	Required	Required	SHR General Orientation

¹ The requirements within one level assumes requirements at all previous levels as well as for that particular level

² SHR Policies: Code of Conduct, Fraud, Speaking Up, Conflict of Interest, Tobacco and Smoke Free Policy, Respect and Dignity and Confidentiality

APPENDIX B

Criminal Records Check Risk Assessment Checklist

Complete prior to engaging Advisory Council Members/Steering Team Members and Co-Leaders in SHR Committees, Teams or Project's.

For completion by SHR Sponsor based on how the community participant is intended to participate.

1	Will the participant be responsible for public money?	Yes	Criminal Record Check Required
		No	Go to #2
2	Will the Sponsored Community Participant have the ability to modify information technology systems	Yes	Criminal Record Check Required
		No	Go to #3
3	Will the Sponsored Community Participant have direct supervised contact, or intervention with vulnerable patients/clients/ residents?	Yes	Consider if this will be sufficient to develop a relationship of 'trust'? If Yes – Criminal Record Check Required If No – Criminal Record Check not required
		No	Go to #4
4	Will the Sponsored Community Participant have direct, unsupervised contact, or intervention with vulnerable patient/clients/residents?	Yes	Criminal Record Check Required
		No	Criminal Record Check Not Required
		Perhaps	Consider if this will be sufficient to develop a relationship of 'trust'? If Yes – Criminal Record Check Required If No – CRC not required

APPENDIX C



Recruiting Client and Family Members For Saskatoon Health Region Team...

Saskatoon Health Region wants to improve how we design and deliver services. We need clients and families as active members of the *Client and Family Centred Care Team*. This team will be developing a framework for partnering with clients and families in planning, delivering and evaluating our services. Your voice and experience is key to our success.



Saskatoon Health Region *Client and Family Centred Care Team* is looking for Client and Family members who are:

- interested in serving as advisors and partners on this unique team
- able to share insights and information about their healthcare experiences
- comfortable speaking in a group in an open manner
- able to use their personal experience constructively
- concerned about improving healthcare
- interact well with many different types of people
- able to listen well and hear differing opinions

Who we are:

The SHR *Client and Family Centred Care Team* members come from a variety of backgrounds: Senior Leadership, Medical / Physician, Quality Services, Social Work, Client Concerns, Maternal / Child Care, and Primary Health. We are looking for three Client and Family members to help shape and guide our work.

When we meet::

- Mondays from 4:30-6:30pm, every second week

If you are interested in joining our team, please contact:

Staff Name, Saskatoon Health Region

(work) 655-

Recruitment open until: add date

APPENDIX D



**Sponsored Community Participant
Registration Form**

The Sponsored Community Participant Registration Form is for any individual who is not a SHR staff member or registered volunteer within Saskatoon Health Region, yet has been asked/sponsored by SHR Staff to be involved in an organizational committee, team or project.

SECTION 1. To be completed by SHR Staff

Sponsored By: (employee within Saskatoon Health Region)

Name: Department: Ph #:

Type of Involvement:

- Advisory Council Member Steering Team Member
- Committee Member Co-Leader

Length of Involvement (dates and times):

Description of role and responsibility (to be completed with SHR sponsor):

SECTION 2. To be completed by applicant

Please complete the form, and attach Criminal Records Check, if applicable.

Date:	
Name:	
Street Address:	
City / Postal Code	
Phone # / Cell #	

Occupation: (current or prior to retirement)	
Training/Skills/Interest:	
Language(s):	
Times Available: (days/time of day)	

Confidentiality Agreement:

- A. As a Sponsored Community Participant with Saskatoon Health Region, I understand that I may have access to confidential information that includes, but is not limited to, information relating to: Patients, other Saskatoon Health Region employees or volunteers; Saskatoon Health Region business information.
- B. Confidential information is protected by law and by strict Saskatoon Health Region policies.

As a condition of my participation I agree that:

- 1. I will use confidential information only as needed to perform my legitimate duties with Saskatoon Health Region. This means, among other things, that:
 - (a) I will only access confidential information for which I have a need to know in connection with the services I am providing to Saskatoon health Region;
 - (b) I will not in any way divulge, copy, release, sell, loan, review, alter or destroy any confidential information except as properly authorized within the scope of my duties with Saskatoon Health Region; and
 - (c) I will not misuse confidential information or carelessly care for confidential information.
- 2. I will safeguard and will not disclose or share any passwords, user IDs, clearance badges, access cards, keys or other codes or devices assigned to me (or created by me) that allow me to access confidential information. I accept responsibility for all activities undertaken using such codes and devices.
- 3. I agree that my privileges hereunder are subject to periodic review and, if deemed appropriate by Saskatoon Health Region, revision.
- 4. I agree that I have no right or ownership interest in any confidential information.

5. I understand that my failure to comply with this Agreement may result in my loss of appointment with Saskatoon Health Region and/or legal action being taken against me.
6. I agree to review and comply with the following Saskatoon Health Region policies as amended from time to time: Code of Conduct, Fraud, Speaking Up, Conflict of Interest, Tobacco and Smoke Free Policy, Respect and Dignity and Confidentiality.
7. The obligations contained in this Agreement are intended to be complimentary to any similar obligations I may have agreed to in other Saskatoon Health Region agreements or policies or as may be imposed by law or applicable professional ethical obligations. To the extent of any inconsistency between such obligations, the obligations imposing the highest confidentiality standard shall govern.
8. I agree that my obligations under this Agreement will continue after any termination of my appointment with Saskatoon Health Region.

AGREED TO BY:

Signature

Date

Printed Name

Witness Signature (SHR Sponsor)

APPENDIX E

SAMPLE ORIENTATION GUIDELINES

ORIENTATION/REFERENCE GUIDELINES INFORMATION TO PROVIDE TO COMMUNITY PARTICIPANTS

ORIENTATION (binder provided)

1. General Information

- Welcome letter
- Sponsored Community Participant Registration Form

2. Background information and/or reports authored by the Saskatoon Health Region or government:

- Annual Report (website link: www.saskatoonhealthregion.ca/about_us/about_us.htm; hard copy available in Administration)
- Latest Report to the Community (website link: www.saskatoonhealthregion.ca/about_us/report_to_the_community.htm)
- Saskatoon Health Region Strategic Plan (booklet provided)
- Privacy Brochure
- Client Representative Brochure

3. Description of type of involvement

- Description of SHR project / initiative with background information
- Description of role and responsibility
- Length of commitment
- Contact information for SHR sponsor