An Approach to Engaging Patients and Other Key Stakeholders in a Mixed-Methods Study Investigating Patients' Experiences with Virtual Care Encounters in Primary Care

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BACKGROUND

Stakeholder engagement throughout the research process enhances the quality and impact of research.[1] Stakeholders are defined as "individuals, organizations or communities that have a direct interest in the process and outcomes of a project, research or policy endeavor"[2] By engaging with a variety of stakeholders like patients, clinicians, and decision-makers, research findings can be more responsive and meet the needs of those most impacted.[3-4] Intentional and meaningful engagement with stakeholders has been proven to further refine research tools, assistance with improving language directed at participants, and support the promotion of patient-centred outcomes.[3-6] Despite the noted importance of broad, collaborative engagement with a variety of stakeholders, the literature highlights the high variability of engagement, with a noted lack of consultation with policy & decision makers, despite their influence to make a difference.[3-6]

STAKEHOLDER ENGAGEMENT STRATEGY

Patient Advisory Committee

- Brings expertise from diverse lived experiences related to virtual care, patients' perspectives on primary care, and representation from different geographical regions.
- Provides guidance on areas to explore, assistance in developing research tools, support with recruitment, and offering insights on interpreting findings.

Professional Organizations

- Brings expertise on the real-world application of virtual care in practice settings, existing knowledge gaps needed to be filled in order to optimize virtual care. Provides immediate opportunities for integrative knowledge translation and exchange to enable the application of research findings to professional and practice settings.
- Offers insights and feedback to all stages of research, including development of tools and how to position findings to best inform future of virtual care in Ontario.

Policy & Decision Makers

- Brings expertise on the provincial-wide perspective of virtual care, deep knowledge on the systemic and policy factors related to integration of virtual care, strategic planning on the future of virtual care. Provides immediate opportunities for integrative knowledge translation and exchange to enable the application of research findings to professional and practice settings.
- Ongoing consultation to identify key priority areas to focus on for study, informing where patient feedback will be most impactful in health care policies.

Researchers

- Brings expertise from diverse professional perspectives, conducting health system research, qualitative and quantitative methodologies, in-depth knowledge and relationships within primary care, and approaches for integrative knowledge translation and exchange.
- Offers contributions that helped create study design. Provides guidance on areas to explore, assistance in developing research tools, support with recruitment, offering insights on interpreting findings, and guidance on approaches for knowledge translation.

STUDY METHODOLOGY

Study Purpose
- Develop recommendations about virtual appointments in primary care from perspective of patients & caregivers.

Sample Population
- Patients & caregivers in Ontario with 1+ virtual (telephone or video) appointments in a primary care setting since March 2020.

Phase 1: 2020-21 – Understanding Patients' Experiences with Virtual Care
- Mixed-method with qualitative, semi-structured interviews (N=55) and quantitative, provincial-wide survey (N=534).

Phase 2: 2022-23 – Understanding Equity and Virtual Care (in Progress)
- Mixed method with qualitative, semi-structured focus groups and quantitative, provincial-wide survey that assesses key dimensions of care including technology, patient-provider relationship, quality of care, whole person care, access, and privacy and confidentiality.

PATIENT ADVISORY COMMITTEE

Engagement with patient advisors started with robust recruitment by contacting patient advocacy groups and health-oriented organizations. Our Patient Advisory Committee consists of 6 individuals who represent a diversity of backgrounds in Ontario: **Patti Jo Duggan** (North), **Sholom Glouberman** (Toronto), **Esther Guzha** (Toronto), **Nokukhanya Ngcobo** (Toronto), **Jeanette Smith** (East)**,** and **Calvin Young** (North).

PROFESSIONAL ORGANIZATIONS

Crucial to our research are professional organizations from different sectors in primary care and represent a range of different primary care organizations: **Association of Family Health Teams of Ontario, Alliance for Healthier Communities, Ontario College of Family Physicians, Village Family Health Team, Nurse Practitioner-Led Clinic Association, Indigenous Primary Health Care Council** and **Ontario Medical Association.**

POLICY & DECISION MAKERS

We have connected with important policy and decision makers to identify priority areas for our study. Consultations with stakeholders at the Government of Ontario's **Ministry of Health** and **Ontario Health** has led us to create a separate survey specific to caregivers, as well inquiring about equity to understand the experiences of different patient populations.

RESEARCHERS

Our team of interprofessional researchers bring a wealth of experience and expertise on team-based primary care, health equity, patient-centred care, health policy, health care delivery, mental health, and interprofessional collaboration. Variety of professions represented including social work, occupational therapy, public health, and pharmacy: Dr. **Rachelle Ashcroft, Dr. Simone Dahrouge, Dr. Judith Belle Brown, Dr. Lisa Dolovich, Dr. Catherine Donnelly, Dr. Jean Grenier,** and **Dr. Bridget Ryan**.

CONCLUSION

Our study illustrates that multi-pronged engagement with key stakeholders in healthcare research is an asset to the research process and outcomes. We will continue to engage our key stakeholders and PAC as we follow through with other knowledge translation activities.

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