

# Creating Safer Outcomes by Partnering with Patients

*International Forum on Quality & Safety in Healthcare  
Utrecht, 2025*

**Presenters:**

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**Kerseri Scane:** Manager Patient Engagement  
for Healthcare Improvement

**Julie Fox:** Senior Planner Pa  Patient Experience

# Why is this important?





# Josie's Story





# Martha's Rule





# Why is this important to us?



**Laura**



**Santa**



**Kerseri**



**Julie**



# Let's Talk!

## Instructions

Go to

**[www.menti.com](https://www.menti.com)**

Enter the code

**7587 7476**



Or use QR code

# Turtle Island Land Acknowledgement (Canada)





# UHN | Canada's #1 Hospital



**590,796** Patients actively being cared for

**323,642** Patients engaging through the portal

**73%** Patients who recommend UHN (last month)

## PATIENTS SERVED IN THE MONTH OF MARCH

**100,404**  
Ambulatory care visits

**3,944**  
Inpatient discharges

**96.3%**  
Occupancy

**6.0**  
Average length of stay

**10,693**  
Patients cared for in the ED

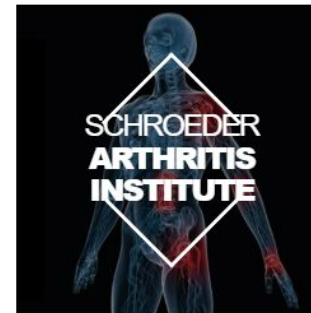
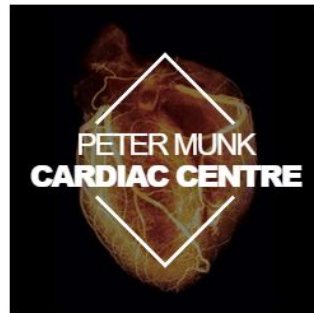
**5.1 Hours**  
Average wait time in our ED

**876**  
Days surgeries performed

**129**  
Patients died



# UHN's Programs



## TeamUHN 2023-24 Overview

- 24,490 Staff & 2,043 Physicians
- 493 Volunteers & 159 Patient Partners\*
- 14,400 Learners

\*Patient Partner Engagement in Staffing: Patient Partners sit as full members of Senior Leadership search committees and on all of the roles hired onto the Patient Experience/Patient Engagement team

# Patient Engagement and Experience Portfolio

Eight key programs that support UHN to provide equitable, clear, accessible, timely and compassionate care

## Engaging with Patients in Personal Care and Health Decisions



myUHN Patient Portal



Patient & Family Learning Centres



Patient Education and Engagement



Interpretation and Translation Services

## Engaging with Patients in Program and Service Design



Patient Relations



Patient Experience Measurement



Patient Partnerships



Caregiver Support Hub





# A Compass for Our Care

## UHN Patient Declaration of Values

 Patient Experience

 **UHN** Toronto General  
Toronto Western  
Princess Margaret  
Toronto Rehab  
Michener Institute



Respect and dignity



Empathy and compassion



Accountability



Transparency



Equity and partnership

### Navigating our values

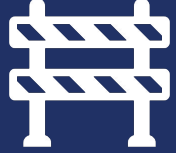


To learn more, email [patientexperience@uhn.ca](mailto:patientexperience@uhn.ca)



Scan the QR Code to see  
the full document for  
definitions and behaviours  
for these values

# By the end of the session, you will:



Identify the barriers that exist for patients and families to flag deteriorating care concerns



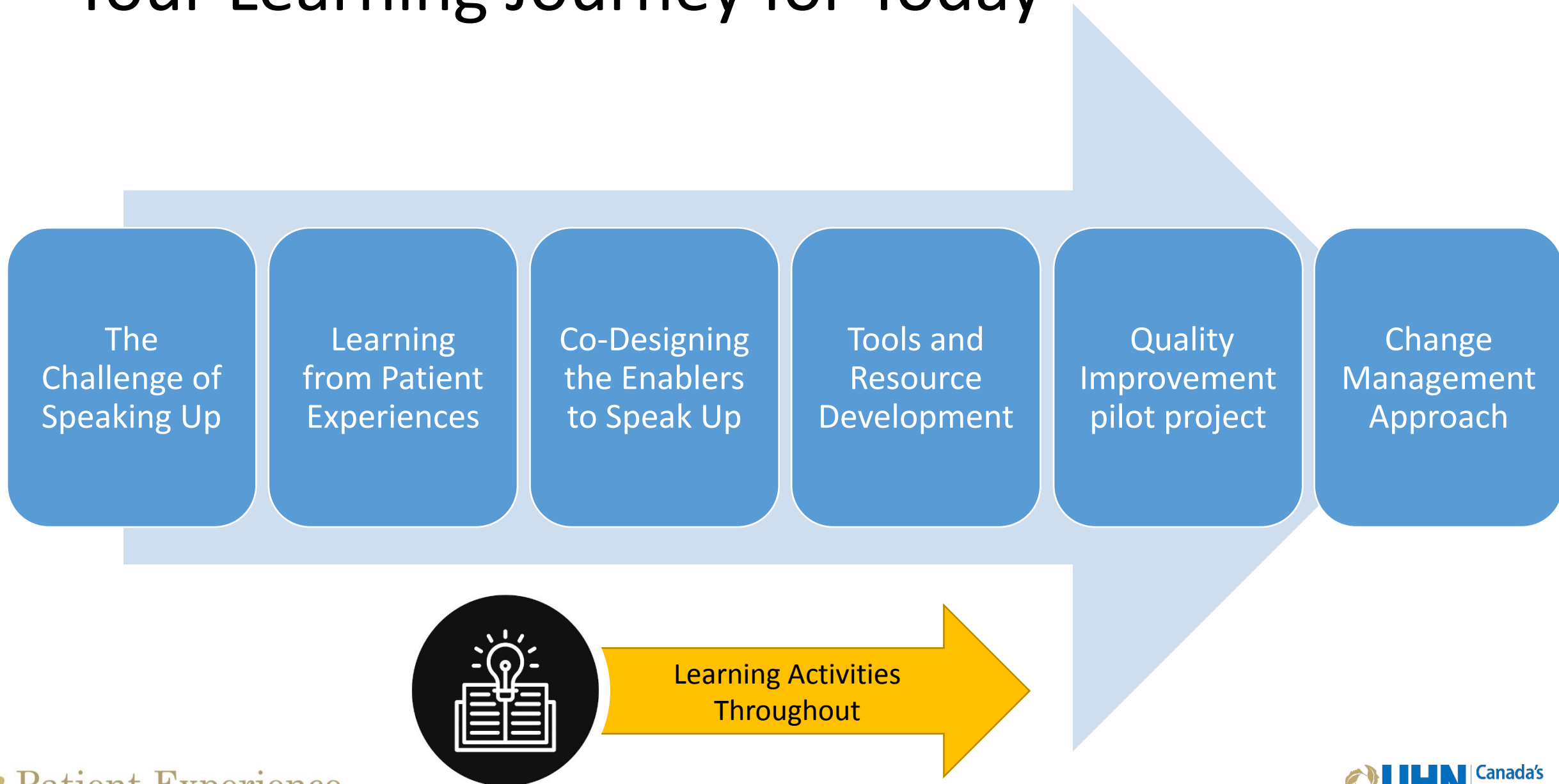
Apply practical tools that enable a culture where staff authentically partner with patients and families as part of their care team, and where patients and families feel safe to speak up about their care concerns.



Leave with tangible resources for implementation of a change management approach that supports care teams to know the importance of empowering patients and families to raise care concerns and have the confidence and skills to respond



# Your Learning Journey for Today



# The Challenge of Speaking Up



# Story



Impact on vulnerable patients and families:

Acknowledging Physical and Non-Physical harms



# Think – Pair – Share

Think about a time when you felt worried or concerned about something but it was hard to speak up.

Think:  
Individually, reflect on this question considering:

- What made you worried?
- What made it hard to speak up? (2 min)

Pair:  
With someone at your table, discuss your experiences (4 min)





# Let's Share

## Instructions

Go to

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# Santa's Experience – ***“I knew something was wrong”***

# Factors Discouraging Patient & Essential Care Partners in Escalating Care



(Bell et al., 2017; Rainey et al., 2012; Schenk et al., 2018).

# There are barriers for staff too, so an Escalation of care Policy was needed

**“ Escalation of care is the communication of a patient care or administrative concern to the most appropriate TeamUHN member.”**

**A UHN-wide and Academic Health Science Region wide area of focus for quality & safety.**  
Selected due to the role it plays in preventable patient safety events.

Policy developed that supports staff in escalating urgent or emergent care concerns  
Provides a direct escalation pathway for staff including a communication matrix that identifies who to escalate the concern to and if not getting a response, a clear identification of whom to escalate to next





# The Challenge of Speaking Up

- It takes courage to speak up
- This is a complex issue
- There are barriers to speaking up
  - Power imbalance
  - Lack of trust
  - Fear
  - Worry
  - Lack of information
  - Knowing who to talk to
  - Not being listened to

**Santa's  
Story**

**Literature**

**Pair-Share  
Exercise**

Break (10 min)



# Learning from Patient Experiences

What did we learn?



Santa's Experience –  
***“I decided to speak up, but I wasn't heard”***

# A Compass for Our Care

## UHN Patient Declaration of Values

 Patient Experience

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Respect and dignity



Empathy and compassion



Accountability



Transparency



Equity and partnership

### Navigating our values



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Scan the QR Code to see  
the full document for  
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for these values




# Learning from Santa's Story

## Impact on the Patient Experience

Patient Declaration Value	Patient/Family	What is the Impact?
 Accountability	I didn't feel the staff were being accountable as they weren't being responsive to my concerns	Loss of trust  May not speak up again

# Learning from Santa's Story

## Impact on the Patient Experience

Patient Declaration Value	Patient/Family	What is the Impact?
 Equity and partnership	I knew that something was wrong and now I realize that if the staff had partnered with me in addressing these concerns, we could have discovered the problem sooner.	Not feeling heard  Physical safety at stake  Psychological safety at stake  Fearful of the quality of care going forward

This experience is remembered by Santa to this day

# The Impact of Delaying EOC

These impacts have been identified in UHN Serious Safety Event reviews



## DELAY IN DIAGNOSIS

Delaying escalation of care to the most appropriate team member could delay the diagnosis of a patient condition



## DELAYS IN TREATMENT

Delays in the initiation of appropriate treatment or care plans, leading to morbidity, mortality, increased length of stay in hospital or transfer to intensive care

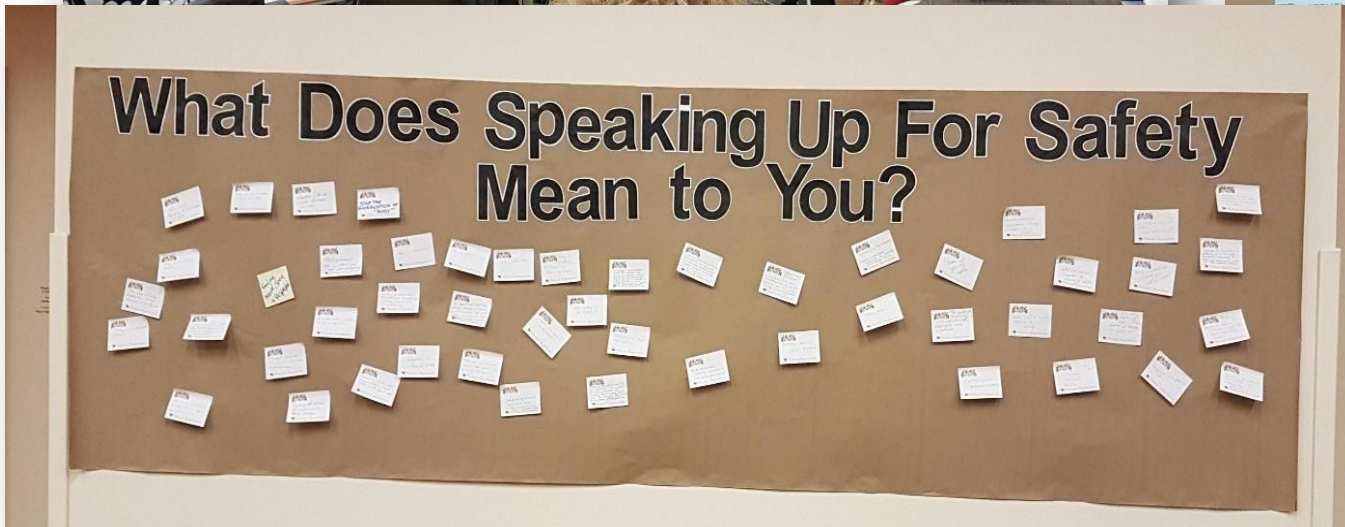


## FAILURE TO RESCUE

The inability to rescue a patient from a deteriorating condition

(Johnston et al., 2015; Sankey et al., 2016; Silber et al., 1992)

# Insights from UHN Patient Experience Safety Summit





# Our Summit Learnings

*"Because I spoke up....Because I listened"*

A "fishbowl" discussion amongst 7 participants of healthcare providers, patients and caregivers about their own experiences, insights and hopes.



- **Patients** shared examples where their concerns and gut feelings were dismissed – some found courage to speak up but others felt too silenced
- **Health providers** shared the difficulty of shifting from “expert,” action-oriented mode to listener/partner in care.

## Key learning:

- **Vulnerability** was needed
- **Relational care** needs to be the focus
- **Invitation** to speak up is key
- **Pausing** to listen needs to be part of the culture.

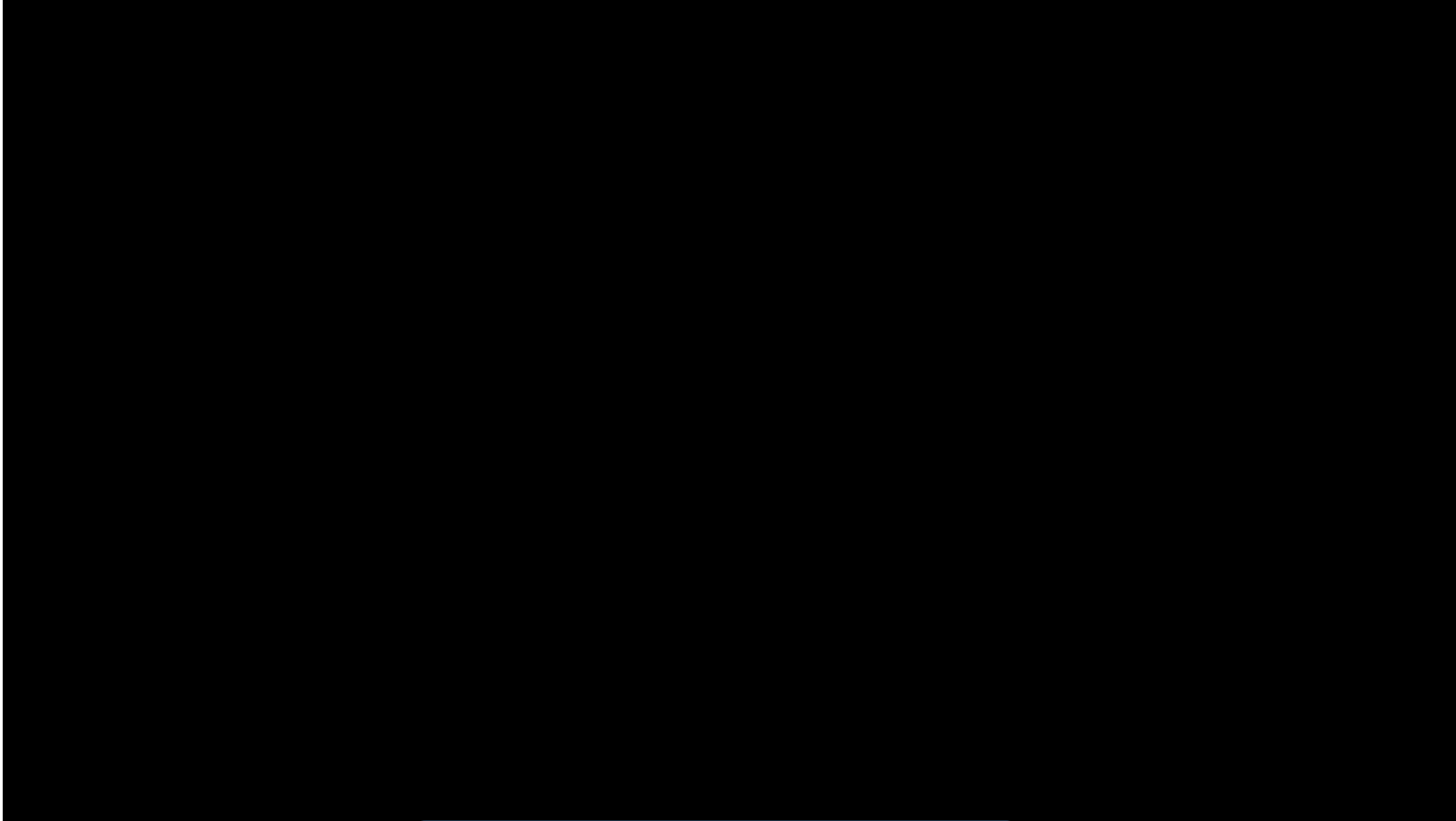




# Table exercise

*“Because I spoke up....Because I listened”*

- When you think about the theme that came from this Summit, and your own context and environment,
  - What do you notice about the partnership that exists between care providers, patients and families?
  - What evidence do you have that this kind of vulnerability, partnership and relational strength exists, or does not exist in your organization?
  - What barriers exist for this kind of partnership?
  - What enablers could be leveraged?



What enabled Zoe to engage in her care?  
What barriers existed for her?



# Learning from Patient Experiences

- Santa's story –
  - lack of responsiveness impacted physical safety and contributed to fear, lack of trust and psychological safety
- Patient safety summit –
  - open collaboration revealed that when staff and patients have relational strength, patients feel safe to speak up and staff can make the space to listen
- Zoe –
  - Body language, accountability, empowerment

**How do we cultivate an environment and culture that addresses these elements?**

# Co-Designing the Enablers to Speak Up

How do we cultivate this environment?



# Santa's Experience – ***“What would have made me feel safe”***



# Martha's Rule

**Martha's rule: applying a behaviour change framework to understand the potential of complementary roles of clinicians and patients in improving safety of patients deteriorating in hospital**

Christian P Subbe <sup>1</sup>, Siri H Steinmo <sup>2</sup>, Helen Haskell <sup>3</sup>, Paul Barach <sup>4 5 6</sup>

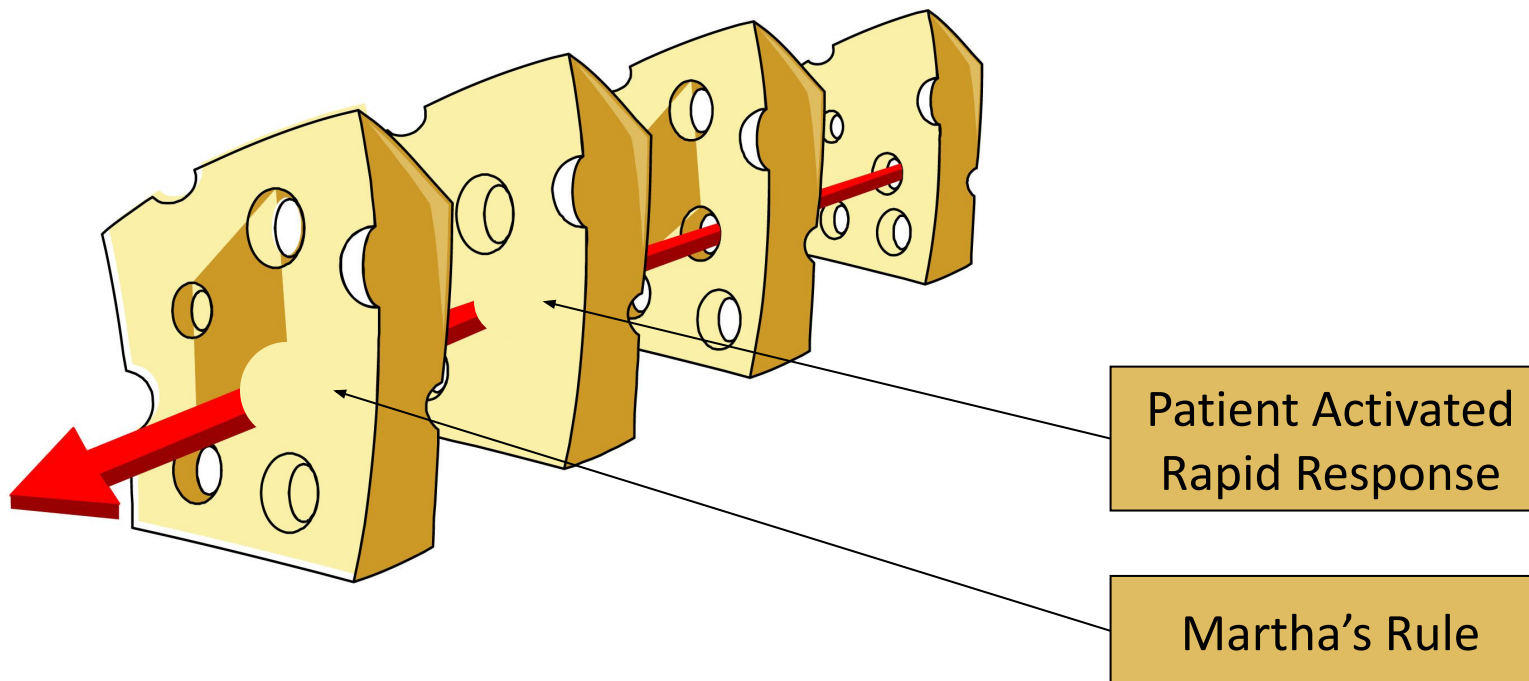
"Armed with the right tools, patients and families could be key and informed witnesses to most events."

**Giving patients, families and staff a reliable voice in acute care: Expert guidance for implementation of Martha's Rule in UK hospitals**

John Welch <sup>1</sup>, Jane Murkin <sup>2</sup>, Eirian Edwards <sup>3</sup>, Matthew Inada-Kim <sup>4</sup>, Christian Subbe <sup>5</sup>



# Addressing systemic barriers



**Goal:** Create a culture and environment where patients feel safe to speak up, always!

# How to support patients and families

1. **Communicate & Invite** patients and families to raise questions and concerns
2. **Provide a pathway** for patients and families on how and who to contact when they need help
3. **Give information to** patients and families about the signs of deterioration, so that they can raise these flags or questions with their care team
4. **Respond** to care concerns using that reflects respect, empathy, transparency, partnership and accountability



# What is the Impact?

Instructions

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# Learning Activity – Designing the Environment

1. **Communicate & Invite** patients and families to raise questions and concerns
2. **Provide a pathway** for patients and families on how and who to contact when they need help
3. **Give information to** patients and families about the signs of deterioration, so that they can raise these flags or questions with their care team
4. **Respond** to care concerns using that reflects respect, empathy, transparency, partnership and accountability

At your table, choose  
1 element listed

- What ideas do you  
have about how you  
might enable the  
care team to  
consistently practice  
this element





# Co-Designing the Enablers to Speak Up

- Santa's insights: ask me; tell me what to watch for; listen to me
- Recognize that care teams nor patients can do this alone; Create a myriad of ways to fill the holes in the Swiss Cheese Model
- Martha's Rule: inclusion and participation of patients and families directly into the care team and given a direct way to escalate
- How do we get care teams to intentionally and consistently:
  - Build relational strength with patients and families and communicate and invite them to raise concerns
  - Provide a clear pathway of escalation
  - Give information on the signs of deterioration
  - Respond

Break (10 min)



# Tools Developed for Patients, Families and Care Teams

# Patient Facing Posters

## Communicate & Invite

**It is safe to ask  
We are here for you**



Providing safe, compassionate & high quality care is our priority  
You and your Essential Care Partners are important members of the care team.

**Please share with us:**

- What is most important to your healing
- Questions you have about your care
- Concerns you may have about your care

**Please tell us when you:**

- Are worried that your medical condition is getting worse and needs attention now
- Feel confused about your treatment plan
- Feel something about your health has not been addressed

**It is okay to ask for help. You can talk to:**

**Your Nurse for Today**  
Not sure who your Nurse is today? Check the whiteboard near your bed or ask at the unit reception desk

**Charge Nurse**  
Ask at the nursing station or care station, or ask your Nurse to contact them for you

**In-house Covering Physician**  
Speak to your Nurse to contact them for you

**Unit Manager**  
Ask your Nurse for the Unit Manager's name and phone number



**UHN**

Date: November 2022

## Provide info on signs of deterioration

**It is safe to ask  
We are here for you**



You and your Essential Care Partners are important members of your care team. Essential Care Partners or other visitors who know you personally often notice when something does not "seem right".

**If you notice any of these changes in your health condition, tell a member of your care team**

**Changes in how you look or act**

**Mental state**  
You feel or look confused, or have changes in speaking, memory, behaviour or energy levels.

**Chest pain or shortness of breath**  
You have trouble breathing, or a tight or uncomfortable feeling in your chest.

**Pain**  
Sudden, new OR severe pain in any part of your body

**Suddenly feeling too hot or cold**  
Or sudden shivers

**Urine (pee)**  
Changes in the amount or colour of your pee. Peeing noticeably less or more often. Pee that looks darker in colour or smells differently.

**Feeling unwell or worse**  
If you feel something is wrong or that you are becoming more sick. Patients often have a sense that their condition may be getting worse.

**Skin changes**  
Changes in how your skin looks or feels. Skin may feel cold or clammy. It may look gray, dull or yellow, depending on your skin tone.

**UHN**

Adapted with permission from: Copyright 2012  
Julia A. Hedges, An Empowered Patient® Publication

Date: November 2022

# Building Capacity: Script to Invite and Educate

## 1. Create a safe partnership environment (see [Appendix 1](#) for invitation poster):

“While you are here, we want to support your healing and make sure that you are safe. You and your essential care partner are important members of the care team. This means that we need you to share with us:

- What is important to you;
- What questions you have about your care;
- When you are worried that your medical condition is getting worse”

## 2. Explain who patients and families can talk to (See [Appendix 1](#) for invitation poster):

“When you are worried that things are getting worse, please don’t wait to ask for help. It is ok to ask anyone for help.

These are the people who you can talk to ([point to bedside invitation poster](#)): You can start with me, as your nurse for today and here is my name ([point to white board](#)).

I will do my best to respond and connect with your doctor if needed. But if you feel your medical concern is not being addressed, you can talk to our Charge Nurse, Unit Manager or speak directly to the in-house Physician/Doctor ([point to where they can be contacted](#)).”

## 3. Share what medical changes are important to report (see [Appendix 2](#) for signs of deterioration poster):





“I’d like to share with you the kinds of things that we want you to tell us about because you know yourself best and your essential care partner can also tell when something doesn’t seem right. So if you notice any of these changes ([point to Changes in your health condition poster](#)), please tell me:

- Changes in how you look or changes in how you act
- You feel or look confused or changes in how you speak or behave
- Trouble breathing or pain in your chest
- Sudden, new or sever pain
- Suddenly feeling too hot or cold
- Changes in the amount or colour of your pee
- Feeling like things are getting worse
- Changes in how your skin looks or feels

We want to work together to get you better and keep you safe.”



# Acknowledge, Empathize, and Inform

Acknowledge	Empathize	Inform
 Respect and dignity	 Empathy and compassion	 Accountability  Transparency
Acknowledge the patient's situation so they feel heard & respected	Empathize with the patient so they feel heard, understood and respected	Inform with as much information as available
Use reflective listening; speak in a judgment-free way; restate/summarize	Establish rapport and trust with empathy; reflect thoughts/emotions/values; use the feeling words the patient used	Outline what you know and what the next steps will be; include when you will be back with an update

- AEI is a communication tool for healthcare professionals to help communicate with patients & families
- Using this tool can: decrease patient anxiety, improve patient outcomes, improve patient experiences





# Let's Try It!

You are a team member working on an inpatient unit and your patient says:

*“I’m peeing a lot since the surgery. I had this before and I got really sick. I’m worried that I have an infection.”*

## **ACKNOWLEDGE** the concern?

- “Thank you for telling me about this”
- “It sounds like you are very worried you may have an infection because you notice you are peeing more frequently”

## **EMPATHIZE** with the patient?

- “I am sorry you are going through this, I imagine this feels scary to you as it has happened in the past. You did the right thing by telling me”

## **INFORM** the patient?

- If you are the patient’s nurse
- If you are not the patient’s nurse

# Case Study – The Scenario





- You are caring for Dev who has shared that their pronouns are she/her.
- Dev recently had surgery and is recovering on the unit
- She has been on scheduled non-opioid analgesics and PRN opioid analgesics. Part of her care plan is to reduce the amount PRN opioid analgesics and the MRP changed the PRN frequency today from Q6H to Q8H.
- You are in Dev's room and she says:

*“Excuse me, I am in a lot of pain can I have more pain medication? It’s a really sharp pain where they did the surgery, I’m really worried”*

**What would you say to *Dev* to respond to her concern?**

*Use the AEI Tool to help you navigate this scenario*

# Acknowledge, Empathize and Inform

Acknowledge	Empathize	Inform
Acknowledge the patient's situation so they feel heard & respected	Empathize with the patient so they feel heard, understood and respected	Inform with as much information as available
<p>"It sounds like you are in more pain. I'm glad you said something Dev."</p>	<p>"I'm sorry your pain is not controlled and understand this is causing a lot of discomfort for you. I will do what I can to help you manage your pain."</p>	<p>"As part of your care plan, the frequency was changed to every 8 hours and I do not have an order to administer more at this time. But here is what I'm going to do. I will call the doctor now regarding your concern and will let you know the outcome.</p> <p>We want to work together to reduce the amount of opioids you are taking. This is important because it is difficult to manage opioids in the community and there are some additional side effects that can have negative impacts on your recovery.</p> <p>If it worsens, please let me know. "</p>
 Respect and dignity	 Empathy and compassion	 Accountability  Transparency



# Tools Development

- Building Capacity in care teams about:
  - The importance of using these tools to create an environment of partnership, trust and safety
  - Practicing the invitation to raise care concerns consistently and to respond to concerns by acknowledging patients, showing empathy and giving them key information about next steps



# UHN's Implementation Quality Improvement pilot project

# Approach: Model for Improvement





# Project Aim

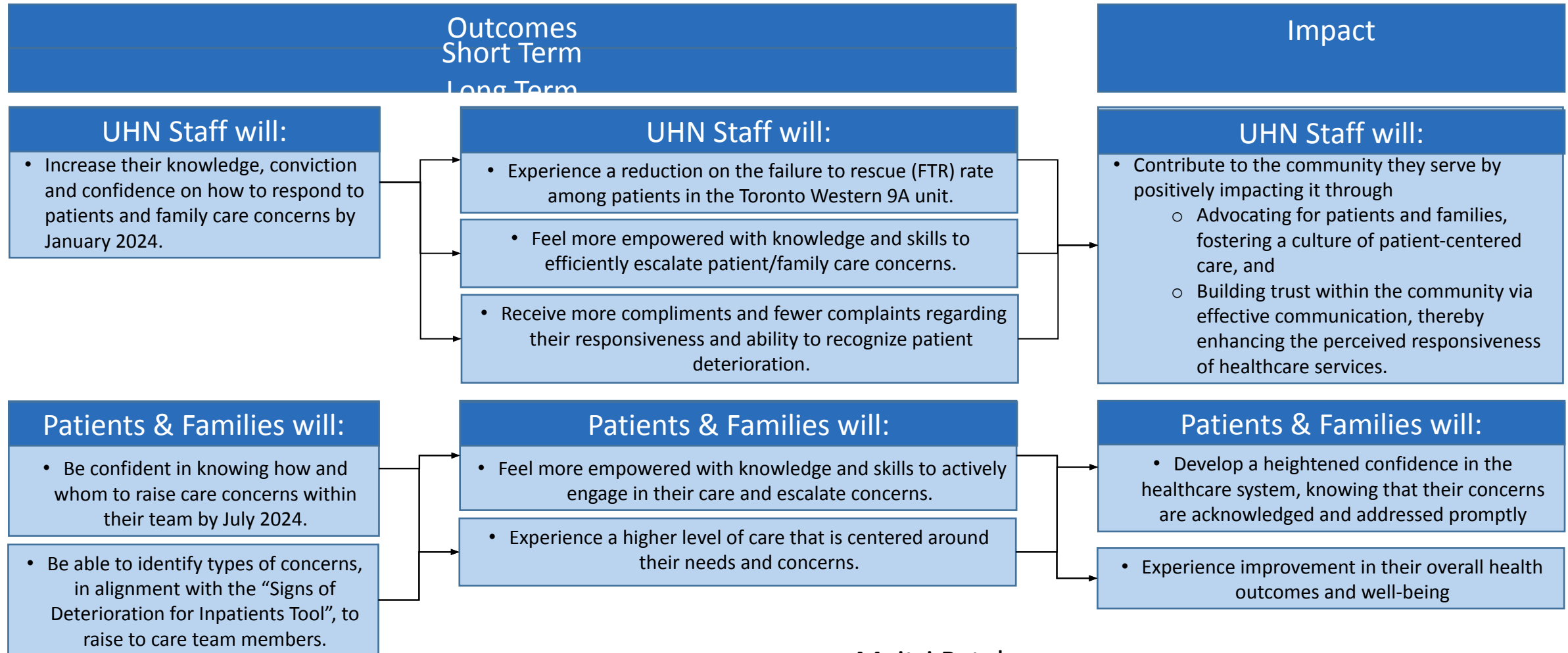
## What were are we trying to accomplish?

- 1 **Team members** will increase their knowledge, conviction and confidence on how to respond to patients and family care concerns by January 2024.
- 2 **Patients and families** will be confident in knowing how and whom to raise care concerns within their team by July 2024.

Secondary Aim:

- **Patients and families** will be able to identify types of concerns, in alignment with the “Signs of Deterioration for Inpatients Tool”, to raise to care team members by July 2024.

# Logic Model: Outcomes & Impact



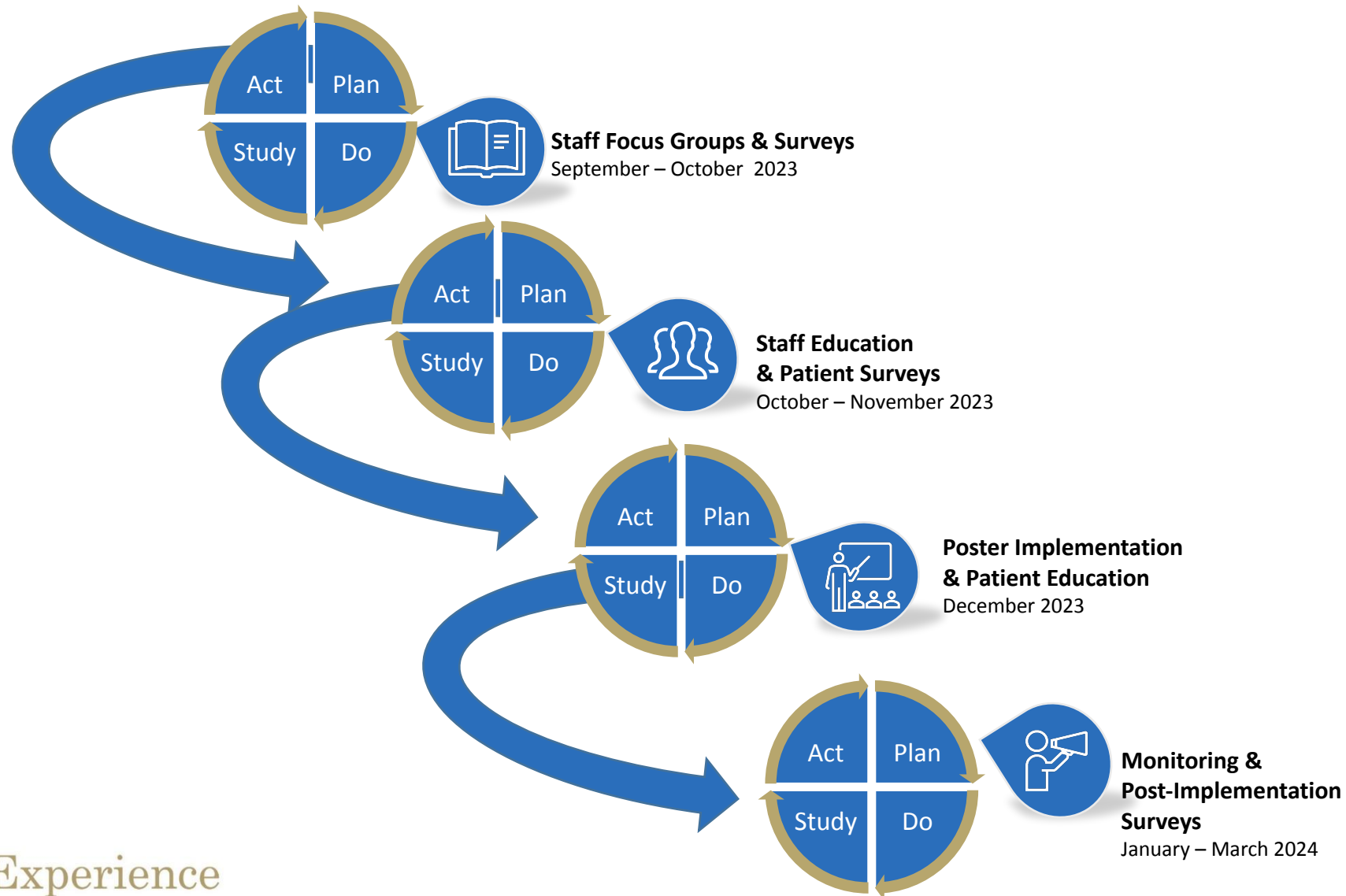
Maitri Patel MPH Health Promotion Student, Class of 2025

Dalla Lana School of Public Health  
University of Toronto

# Engagement & Change Ideas

How are we going to accomplish this?	
People Engagement	New process/tool implementation
Staff Focus Groups	Poster instillation
Communication through huddles and emails	Bundling care practices
Conviction & Confidence surveys (staff & patient)	
Staff education	
Rounding to influence with staff and patients	

# Rapid Cycle Improvement



# Change management approach

**Goal: Create a care environment of partnership, safety & trust**

- **Build conviction** about the importance of encouraging patients & families to raise emergent/urgent care concerns using the tools provided.
- **Build confidence** in the skills to communicate, invite and respond to care concerns.



# Santa's Experience – ***My Role as a Patient Partner***



# Lessons learned



It's about the environment and communication, not the posters!

## **Ongoing organizational focus on supporting teams to:**

- Create a safe environment and invite patients and families to raise urgent and emergent care concerns
- Respond to patients and families in the moment that aligns with respect, empathy, transparency & accountability

# Change management approach

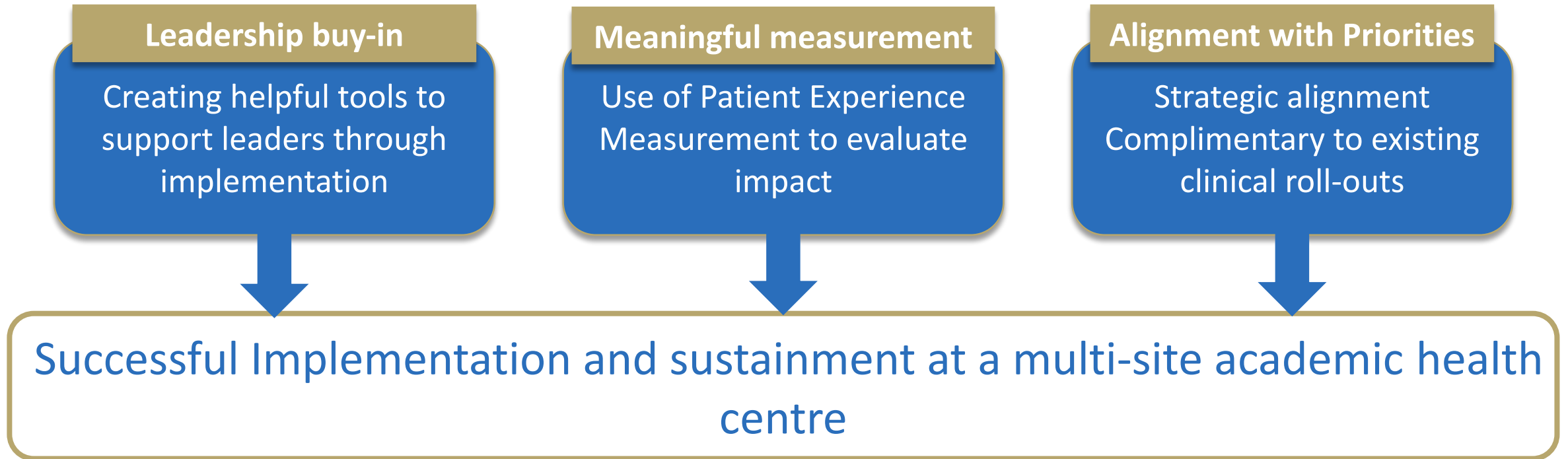
**Goal: Create a care environment of partnership, safety & trust**

- **Build conviction** about the importance of encouraging patients & families to raise emergent/urgent care concerns using the tools provided.
- **Build confidence** in the skills to communicate, invite and respond to care concerns.

**The Leader Toolkit will guide you to:**

- Leverage the person-centred culture you have already built within your teams.
- Create opportunities to engage in specific conversations with your team about this work in an effort to build conviction.
- Provide opportunities for education and practice of the skills required to create this environment of partnership, safety & trust.

# The Challenge of Spread & Scale



## Supporting Patient & Family Escalation of Care: Leader Toolkit

The following toolkit provides Leaders with the steps to support patient and family escalation of care

Aug 2024

**It is safe to ask  
We are here for you**



**Providing safe, compassionate & high quality care is our priority**  
You and your Essential Care Partners are important members of the care team.

Supporting Leaders to enable a  
care environment of  
partnership, safety and trust

# Toolkit Elements

## Key Implementation Steps

## Purpose

Launch

1. Leader Preparation

Review, plan and prepare for implementation

2. Team Engagement

Communicate the change and use huddle discussions to build conviction

3. Team Capacity Building

Build confidence in the communication skills to support patients and families

4. Installation of patient facing tools

Install Patient & Family EOC patient facing posters

5. Round to Influence

6. Evaluate the Impact & Sustain the Practice

Sustain practice by reinforcing the team's commitment to practices & address challenges as they arise

# What will you do next? Discussion!

- Have you identified your why?
- Where will you start to socialize this work? What is your first step?



# Connect with us!

- We want to hear about your journey
- [Laura.Williams@uhn.ca](mailto:Laura.Williams@uhn.ca)
- [Kerseri.scane@uhn.ca](mailto:Kerseri.scane@uhn.ca)
- [Julie.fox@uhn.ca](mailto:Julie.fox@uhn.ca)