

Patient Partner Recruitment & Selection Toolkit

Introduction

This toolkit includes resources for recruiting and selecting a network patient partner, including a [Patient Partner Position Description & Application Instructions](#) and an [Interview Guide & Evaluation](#). These materials were developed with input from REACHnet's two long-standing patient partners and used to recruit two additional patient partners from states where REACHnet's newest member health systems are located. There are four objectives for this toolkit, which may be adapted to local context for use by other research networks or consortia seeking to include patients in governance.

Objectives:

1. Describe the role, responsibilities, and expectations of a Patient Partner, including desired qualities, time commitment, and compensation.
2. Provide a transparent description of the application process and clear and simple instructions for how to apply.
3. Provide suggested questions for interviewing candidates for the Patient Partner position.
4. Provide a scoring rubric, aligned with interview questions, to objectively evaluate the candidate's fitness for the Patient Partner position.

Note: We used [this PCORI resource](#) to inform the structure of our Interview Guide & Evaluation.

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Patient Partner Position Description & Application Instructions

REACHnet Overview

Research Action for Health Network (REACHnet) is a partnership of health systems, academic centers, and public health organizations that constitute an innovative data network for conducting efficient, multi-site research. With national and local collaborators, REACHnet implements research that addresses healthcare questions of critical importance to patients and clinicians and contributes to the evidence base that will inform more effective healthcare decision-making and improve population health.

Two health systems recently joined REACHnet: DHR Health in Texas and University of California San Francisco in California. Baylor Scott & White Health in Texas is also a member of REACHnet. To provide representation, REACHnet is seeking a Patient Partner from each of these two geographic areas to join our two current Patient Partners from Louisiana.

Purpose of REACHnet Patient Partners

Including Patient Partners in REACHnet acknowledges the importance of the patient experience to inform the network, recognizes the expertise of patients advising on the network's strategy and operations, and ensures that patient stakeholders have representation in network governance. As such, Patient Partners serve as content experts and work with REACHnet as consultants to advise on key network activities and processes.

General Consultation Activities

Patient Partners will be expected to provide consultation and feedback via email or in virtual meetings on strategic and operational aspects of the network as well as specific research initiatives. With direction from the REACHnet Coordinating Center at Louisiana Public Health Institute, Patient Partners will be hired under formal contracts with specified deliverables.

Patient Partners work closely with the REACHnet engagement team to support and further build patient engagement initiatives of REACHnet. The ideal candidate will be able to work collaboratively with the patient community and organizations, researchers, and REACHnet staff to effectively incorporate the patient perspective into REACHnet initiatives. This position will provide consultation and direct work on deliverables based on the needs of projects and strengths of the applicant. These include, but are not limited to, the duties and responsibilities below:

- Consult on the approach and co-design training materials related to engagement activities, the research process, and patient-centered outcomes research (PCOR) principles.
- Co-design and review engagement strategies, messaging, and community outreach approaches to increase patient stakeholder understanding of, involvement with, and commitment to REACHnet projects.
- Strategize approaches to overcome engagement challenges (i.e., time, resources, geography, trust).
- Provide review and input for adapting research or engagement materials to be community-facing and patient-friendly.

- Prioritize research topics according to patient perspectives and assist in the facilitation of topic-specific meetings for various research projects.
- Provide ongoing assistance with stakeholder engagement activities of the network as needed.

Meeting Attendance

Patient Partner commitments include the following:

- Biweekly (fortnightly) 30-minute Patient Partner calls on Mondays at 12pm CST
- Quarterly REACHnet Steering Committee meetings for 90 minutes (usually between 11:30am and 5pm CST on a weekday)
- Alternate-monthly hour-long Health in Our Hands meetings at 5pm CST on weeknights

Desired Skills, Knowledge, and Abilities

- Strong connection to patient experience and/or medically underserved populations
- Ability to generalize specific disease/patient experience to a more universal goal of patient centered research
- Active role in community (local, patient, or other- please specify in your personal statement)
- Comfortable with public speaking and group facilitation
- Ability to understand policies
- Experience in patient advocacy
- Confidence to actively participate in multi-stakeholder groups and communicate the patient perspective
- Ability to use technology to collaborate and communicate (e.g. email, Microsoft Word, Microsoft Teams, Zoom)

Requirements

Patient Partners will be required to maintain timely communication with REACHnet staff. Emails and virtual meetings (using Microsoft Teams or Zoom) will serve as the primary forms of communication. Patient Partners will be asked to check their emails daily and respond to consultation requests within 48 hours of the email being sent. This requirement will ensure that REACHnet activities continue to progress efficiently.

Should poor communication (e.g. not responding to consultation requests or regularly attending meetings) cause barriers to productivity, the contract between REACHnet and the Patient Partner may be terminated.

Time Commitment and Compensation

Patient Partners will be asked to commit to a maximum of 4-5 hours per month (no more than 54 hours per year) at a rate of \$60 per hour (maximum of \$3,240 per year). Existing and new stakeholders may be asked to serve as consultants on specific projects as topics arise that align with their patient experience and personal skill set.

Patient Partners will be contracted by REACHnet (through a signed contract with Louisiana Public Health Institute) and will be expected to submit invoices for their hourly work using a provided invoice template. Invoices will be due each quarter (every 3 months) to the REACHnet Program Manager, Meagan Alley. She will assist Patient

Partners in the completion of paperwork and send reminders of invoice due dates. Payments will be issued within 30 days of invoice submission.

Conflict of Interest

Patient Partners are required to communicate their role with REACHnet and compensation to their current employer (if applicable) to ensure there is no conflict of interest. Patient Partners are also required to disclose their work with other community partners and projects to REACHnet (including volunteer and paid work) to ensure there are no conflicts of interest.

Application Process

To apply to become a Patient Partner, please prepare a personal statement of no more than 500 words (similar to a cover letter). Include your reasons for wanting to be a Patient Partner and any experience you have with patient engagement or advocacy. Please email your application to info@HiOH.org.

Applications will be reviewed by REACHnet's current Patient Partners and members of the REACHnet team who will select applicants to interview. Interviews will be held with REACHnet's current Patient Partners and members of the REACHnet team.

Once selected, Patient Partners will go through an orientation process, which will include signing the Patient Partner contract and reviewing training materials.

In summary, the steps are:

- 1. Prepare personal statement (500 words or less) including**
 - a. Why you would like to be a Patient Partner**
 - b. Any experiences you have with patient engagement or advocacy**
 - c. Name, city and state of residence, email address, and phone number**
- 2. Email personal statement to info@HiOH.org**
- 3. If selected, interview with REACHnet team**
- 4. Patient Partners are selected and onboarded (i.e., contracting and orientation)**

Patient Partner Interview Guide & Evaluation

Each person conducting the interview should independently fill out the evaluation metrics shortly after the interview. Evaluation questions and a scoring guide are provided as a standardized and objective mechanism for reviewing candidates.

Interview Guide

Name of Interviewee _____

Name of Interviewer _____

Date of Interview _____

Introduction

REACHnet is the Research Action for Health Network, one of eight clinical research networks across the country that make up the National Patient-Centered Clinical Research Network, called PCORnet® for short. Our partner health systems in Louisiana, Texas, and California participate in research by contributing patient data in a standardized way and enrolling patients to participate in studies. REACHnet Patient Partners are members of the REACHnet Steering Committee, along with a representative from each of the network's partner health systems. Patient Partners play an essential role in helping us advance the collective goal of ensuring that our research is patient-centered.

Interview Questions

1. [If applicable...] How did you learn about this opportunity to become a Patient Partner?
2. Tell us about yourself; what part of your experience with healthcare inspired your interest in becoming a Patient Partner? It could be healthcare for yourself or others.
3. Tell us about your experience with health research. Have you been involved in research, such as surveys, interviews, or a drug or vaccine trial? Have you used health research in your own life?
4. Please share any experience you might have advocating for yourself or others in healthcare or health research? Have you worked with advocacy groups or other community organizations? [If yes...] What groups or organizations have you worked with?
5. Please describe your approach to group discussion and decision making. Are you comfortable sharing ideas in discussions with different viewpoints?

6. What is your perspective on inclusion of people from diverse backgrounds in research?
7. The time commitment for REACHnet Patient Partners includes:
- Biweekly 30-minute Patient Partner calls on Mondays at 12pm CST
 - Quarterly REACHnet Steering Committee meetings for 90 minutes
 - Bimonthly hour-long Health in Our Hands meetings at 5pm CST on weeknights
 - Ad hoc email correspondence to review documents/materials for 1-2 hours/month maximum
- Do you have any questions or concerns about your ability to fulfill this commitment?

Evaluation & Scoring Guide

For each item, please record a score on a scale of 1 to 3 where 1=Low to none, 2=Somewhat/moderate, 3=Very much. Share any rationale you may wish to include for each item (optional).

Criterion	Score	Rationale
1. To what extent does this candidate demonstrate a vested interest in the patient experience in healthcare/research?		
2. To what extent does this candidate have experience with health research?		
3. To what extent does this candidate have experience advocating for themselves or others in a healthcare or health research setting?		
4. To what extent does this candidate demonstrate the ability to share ideas in a group setting, both sharing their opinions and listening to those of others?		
5. To what extent does this candidate demonstrate commitment to fostering representativeness among patient voices? In other words, did they articulate support for the inclusion of diverse people/perspectives in health research (i.e., gender, age, race/ethnicity, geography, etc.)?		
6. To what extent has this candidate demonstrated commitment and responsiveness to the call for Patient Partners (i.e., completed application, responded to emails, expressed enthusiasm)?		

Total score: ____/18

Are there any concerns about the time commitment for this candidate?

If applicable, what advocacy groups or other community organizations does this candidate have experience with (see Interview Question #4)?

Additional notes: