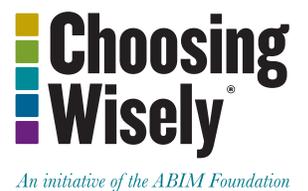
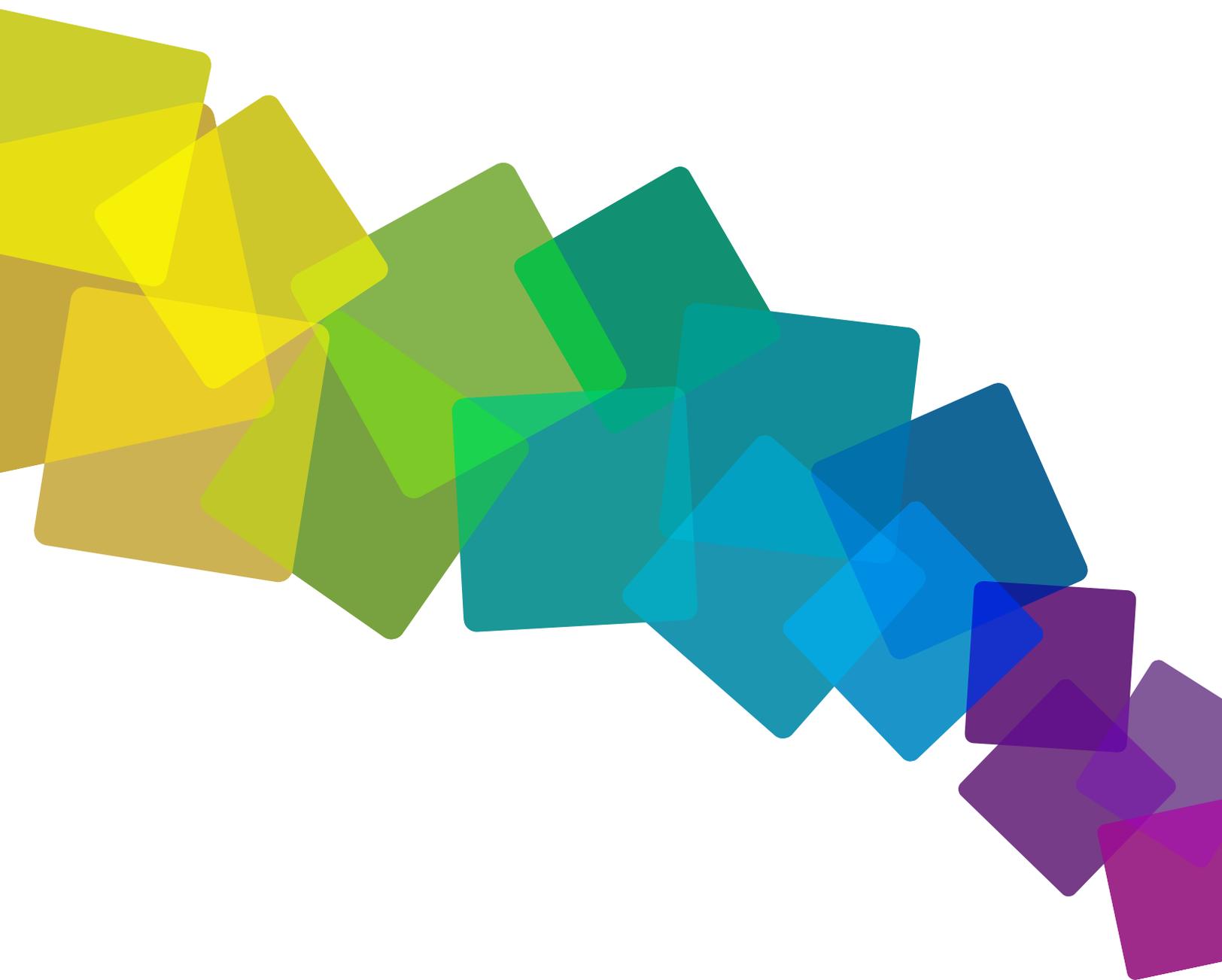


Lessons Learned from Patient Engagement



EXECUTIVE SUMMARY

Consumer awareness and education is critical to sustainable success in the *Choosing Wisely* campaign, a six-year initiative of the ABIM Foundation to help reduce overuse in health care and encourage more conversation between clinicians and patients about effective healthcare choices.

Engaging consumers has been a central focus of the campaign since its launch in 2012, starting with a list of “Five Questions to Ask Your Doctor” and the release of “top five” lists of overused treatments and procedures by nine medical specialty societies.

Since then, more than 80 specialty societies representing a wide array of disciplines have partnered with the *Choosing Wisely* campaign to develop 540+ recommendations on unnecessary tests, treatments and procedures. The specialty societies represent physician-led organizations as well as nursing, dentistry, physical therapy and pharmacology.

More than 70 consumer and employer groups have disseminated *Choosing Wisely* patient materials produced by Consumer Reports, which published more than 100 patient-friendly translations of recommendations.

In an effort to learn about and document the successes and challenges of reaching healthcare consumers with *Choosing Wisely* messaging, Consumer Reports interviewed seven *Choosing Wisely* grantees about successes (focusing on interventions and implementation); challenges, barriers, and surprises; lessons learned; collaboration; and most frequently used patient materials.

Recurring themes quickly emerged related to intervention and implementation, common challenges and barriers to consumer outreach, and the lessons learned regarding partnerships and collaboration.

Trends for each topic are summarized below:

- **Successes:** Display and distribution of patient materials such as posters, rack cards, wallet cards, and brochures in waiting rooms, exam rooms and throughout health-system campuses had impact, as did integrating materials into patient portals. Incorporating *Choosing Wisely* conversations into workflows was seen as a best practice in implementation. Other successes included using social media, working with professional marketers and focusing on “low-hanging fruit” of *Choosing Wisely* such as antibiotic overuse.
- **Challenges, Barriers, and Surprises:** Common statements touched on competing and limited resources (time and money), staff turnover, lack of efficiency and automation, and lack of consumer knowledge and interest.
- **Lessons Learned:** The importance of partnerships, consensus, incentives and messaging were the most commonly cited areas for lessons learned, including most notably the personal risk of physical and/or financial harm from overuse in health care. Another key lesson was taking advantage of internal marketing expertise.
- **Collaboration:** Establishing strong relationships across grantee partners and organizations was a key ingredient for successful collaboration. Additional best practices included holding in-person meetings when possible; adding *Choosing Wisely* discussions to already scheduled meetings; crafting well-planned agendas for monthly team calls and creating written contracts for deliverables.
- **Most Frequently Used Materials:** The most regularly used patient materials referenced “Five Questions to Ask Your Doctor” (posters, wallet cards, banners and PSAs) and antibiotics, back pain and opioids.

FINAL INTERVIEWS WITH 2015–2018 CHOOSING WISELY GRANTEES: Findings from Conversations About Consumer Outreach

In spring 2015, the ABIM Foundation, with support from the Robert Wood Johnson Foundation (RWJF), awarded grants to support seven community-based projects to promote the goals of the *Choosing Wisely* campaign, an initiative to help reduce unnecessary tests, treatments and procedures and to foster conversations between clinicians and patients about effective care.

These grants focused on implementation efforts to reduce unnecessary care at health care delivery systems, hospitals and/or medical groups collaborating with multi-stakeholder community-based groups and physician-led organizations.

Engaging consumers – patients, families and caregivers – is critical to sustained success in the *Choosing Wisely* campaign. In an effort to learn about and document the successes and challenges of reaching health care consumers with *Choosing Wisely* messaging, Consumer Reports conducted interviews with each of the seven grantees to explore four areas: intervention and implementation; challenges, barriers and surprises; lessons learned and collaboration. The interviews also explored frequently used patient materials.

METHODOLOGY

Telephone interviews were conducted between December 5, 2017, and January 19, 2018, and each conversation lasted from 30 to 60 minutes. Project directors at each of the grantee organizations had the option to invite other team members to participate with them in the interviews.

The project directors received the same list of 15 questions prior to the interview. These key informant interviews synthesized learning from the three year funded observational pilot studies to reduce overuse in their communities.

FINDINGS

Grantees expressed clear recurring themes in their responses. These themes are outlined below.

Successes

Successes focused on two primary areas: consumer-facing interventions and implementation.

Consumer-Facing Interventions

Grantees reached out to health care consumers, patients and community members in a variety of ways during the three-year grant period. Each grantee described its greatest successes:

- 1. Greater Detroit Area Health Council:** Talking directly to consumers at community events; installing screensavers at Henry Ford Physician Network; standing banners; and TV public service announcements (though this was limited due to money)
- 2. Integrated Healthcare Association:** Including rotating *Choosing Wisely* topics on Sutter Health’s patient portal, using patient brochures; Sharp Rees-Stealy’s consumer survey, and Center for Healthcare Decisions’s deliberative sessions around overuse

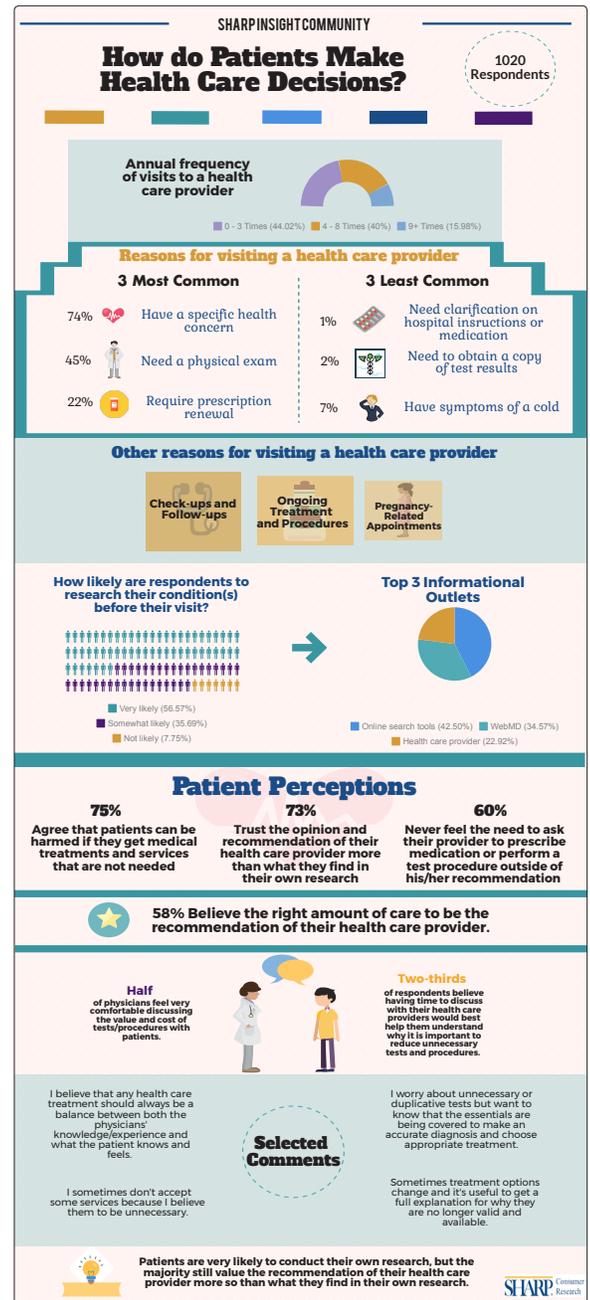


Screen savers used in the Henry Ford Health System helped remind clinicians and patients to discuss when an antibiotic is appropriate.



Recognizing *Choosing Wisely* efforts through social media provides ways to extend awareness about the campaign.

- Maine Quality Counts:** The multi-pronged approach in which health systems provided patient materials in waiting rooms, exam rooms, and throughout health-system campuses; the visual aspect of the large cling-on “Five Questions” posters that could be seen from parking lots; local provider champions and town halls, and influenza wellness packages
- North Carolina Healthcare Quality Alliance:** The “Five Questions” posters throughout Cornerstone, at every outpatient clinical exam room at Duke, at every public health system in the state, and at as many Federally Qualified Health Centers as possible; blogs for Blue Cross Blue Shield members; and web pages for the state health plan’s members
- University of California, Los Angeles:** Attestation poster that all providers in the urgent care clinic signed, helping patients understand they should not necessarily seek antibiotics for a cold
- Washington Health Alliance:** A flyer included in a statewide patient-experience survey; patient brochures, flyers, and posters in exam rooms throughout the state
- Wisconsin Collaborative for Healthcare Quality:** Including a public service announcement on Monroe Clinic’s website; linking to patient posters; promoting patient materials to employees and patients



The grantees thought that many of the above-listed interventions were replicable, though the majority pointed to the importance of working with partners and/or like-minded organizations to do so. They stressed the need to understand collaborators’ goals and agendas in order to effectively and efficiently weave *Choosing Wisely* goals into their collaborators’ pre-established workflows.

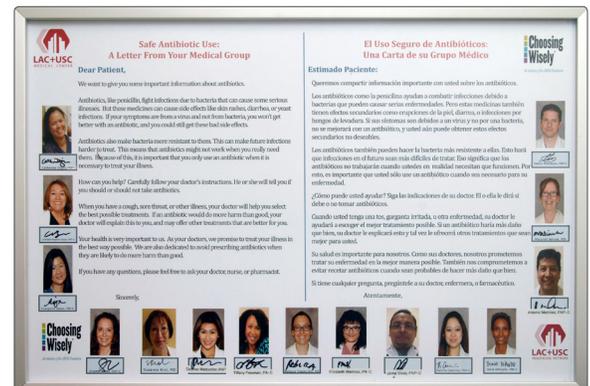
Implementation

As mentioned above, the key to successful implementation was working with partners. In addition, it was critical to think about how to incorporate *Choosing Wisely* into existing internal and external workflow and goals. Multiple grantees suggested having written contracts with partners (to be certain they would meet their agreed-upon deliverables) and/or paying them. They said that payments had to be much more substantial for large organizations than for smaller community-based ones.

Several grantees mentioned that implementation was most efficient when starting with the “low hanging fruit” of *Choosing Wisely*, such as the five questions and materials surrounding antibiotic overuse. They said this generated more buy-in from both colleagues and patients and made it easier to ramp up the campaign and increase activity.

Another key component of successful implementation was using a community-organizing approach, as those in the community have leads, know how their community thinks, and have already tested and tried many intervention methods in previous health campaigns.

Sharp Rees-Stealy surveyed its patient community regarding how they make healthcare decisions to better understand their motivations for seeking care.



Attestation posters signed by providers at LAC-USC proved helpful in helping patients understand why they might not need antibiotics for a cold.

Similarly, several grantees mentioned that partnering with marketing divisions was immensely helpful, based on their experience and ability to get messaging out on a wide scale to clinical staff and health care consumers.

Finally, those who used media to implement their *Choosing Wisely* work advised using both social and traditional media. Several used Twitter to push out #Choosing Wisely Wednesday messaging, but many felt they could have done more with that. Local newspapers tended to be successful in getting messaging out, as did working with community groups and partners that had newsletters. Microsites – either built internally or by Consumer Reports – were also mentioned as a key part of implementation, since inquiries and traffic could all be directed there.

Challenges, Barriers, and Surprises

Trends quickly emerged among grantees when talking about the challenges, barriers, and surprises they faced in carrying out their consumer-facing plans. The top trends including competing and limited resources (time and money), staff turnover, lack of agreement, lack of efficiency and automation, and lack of consumer knowledge and interest.

Competing and Limited Resources

Many grantees, and their partners, faced competing priorities within their organizations, limiting the amount of time they could dedicate to their *Choosing Wisely* work. As many grantees reported, each of their partner organizations already had to communicate about many other health topics, making it a challenge to squeeze *Choosing Wisely* into the queue of existing work and have it fight its way to the top. In addition to the constraint of time and competing priorities, many organizations felt they had limited financial resources, particularly for printing and media expenses.

Staff Turnover

Multiple grantees mentioned that during the three-year grant period, there was significant turnover within the lead organizations (including project directors) and partner organizations, leading to significant stalls and lost momentum.

Lack of Agreement

Some grantees reported lack of agreement around specific *Choosing Wisely* recommendations, leading to standstills at certain times. For example, one grantee had hoped to do a local news segment with one of its physician champions, but could not move forward because the doctor's hospital did not agree with the messaging. A second example is that one of the grantee's health-system partners would not allow for posting to their patient portal on a specific recommendation, as their legal team had an issue around it. A third example that two grantees faced was the challenge of agreeing on how to message around topics when working across a large and diverse area.

Lack of Efficiency and Automation

Several grantees felt that while they were making inroads and having impact, they wanted to be more efficient and automated. One way to do this, they mentioned, is for project directors to know more about workflow within their partners' health systems so that together they could think through how to get information out to patients without relying on nurses or other care team members.

Lack of Consumer Knowledge and Interest

Just as the grantee organizations have competing priorities, they acknowledged that patients and health care consumers do as well. While many of them felt that they raised awareness among health care consumers, they also acknowledged that

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PCHC

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St. Joseph Healthcare

FELICITY HOMSTED, PHARM D
Chief Pharmacy Officer
PCHC

DAVID KOFFMAN, MD
Medical Director
for Internal Medicine
St. Joseph Healthcare

DISCUSSION TOPICS:

- **ANTIBIOTICS:**
Will They Help or Hurt?
- **BACK PAIN:**
X-Rays and MRIs
- **PATIENT ADVOCACY:**
Asking the Right Questions
- **PRESCRIPTIONS:**
Do's and Don'ts

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LET'S TALK: HEALTH CARE DECISIONS
TOWN HALL
Do you feel like you're making the right health care choices? Are you comfortable asking your doctor questions? Join local health care leaders for an open Town Hall meeting to discuss making informed decisions!
WEDNESDAY, JUNE 8, 2016
9:00 AM - 11:30 AM
The Dyke Center at Husson University: 1 College Circle, Bangor, ME

Made possible through support from Choosing Wisely:
Husson University PCHC St. Joseph Healthcare Quality Counts
Choosing Wisely
An initiative of the AHA Foundation

Hosting town hall meetings for the community was part of a multi-pronged approach by Maine Quality Counts to engage consumers in talking about making informed decisions in their health care.

this is a very new topic for the general population and that it will take a long time for the messaging to sink in and culture change to happen. The issue, as multiple grantees stated, is that for decades, health care consumers have made decisions blindly and have done whatever they have been told to do. As one grantee said, “This stuff is not sexy.” And, as another said, “We are now at the very front end of a consumer revolution,” and so while there has traditionally been a lack of knowledge and interest, there is finally now more and better information tied to quality and cost.

Lessons Learned

The biggest lessons that *Choosing Wisely* grantees collectively mentioned focused on partnerships, choosing topics, money, branding, and messaging/marketing.

Partnerships

Establishing strong connections with partners was mentioned by all grantees as a necessity, with a lesson learned being the importance of having in-person meetings whenever possible. Those who did have in-person meetings discussed how well this aligned and bonded the team, so that when challenges arose, they all knew each other and were better able to collaborate. Several grantees noted how well community-based organizations were able to saturate specific demographic groups and populations and how important it was to work closely with them – even if they were not listed on the grant as an initial partner.

Choosing Topics

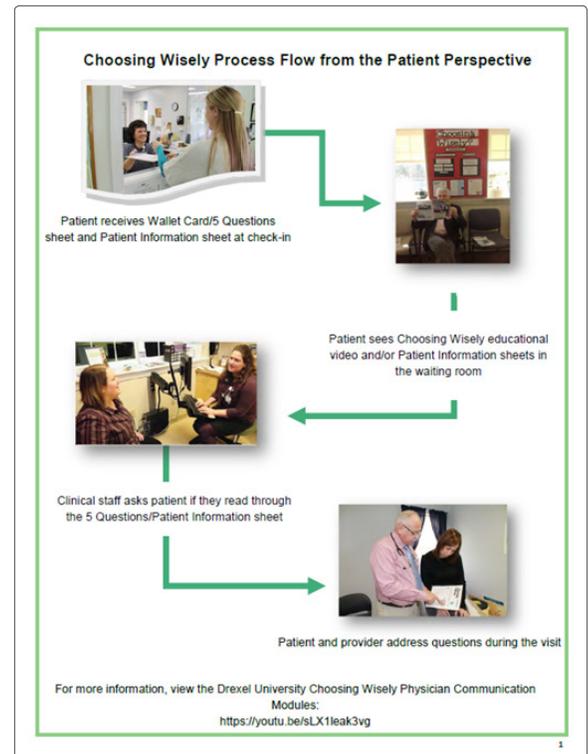
Several grantees noted the importance of choosing the “low hanging fruit” among the many *Choosing Wisely* topics, including starting out with the “Five Questions to Ask Your Doctor” materials. They felt that once community members and partners bought into the general concept of *Choosing Wisely* based on the five questions, it was much easier to move forward with more challenging recommendations and topics.

Funding

It was very challenging to rely on partner organizations if they were not incentivized financially. Even when partners were receiving funding through the grant, the amount of money was sometimes insufficient to keep certain organizations motivated or induce them to complete their deliverables.

Branding

Several groups mentioned that while they and their partner organizations were well aligned in terms of promoting specific *Choosing Wisely* recommendations, there was often disagreement on what branding to use. One grantee mentioned, for example, that it was already promoting work around antibiotic overuse but from the Centers for Disease Control and its state’s Department of Public Health. Because of this, their partners did not want to switch their consumer-facing materials to use the *Choosing Wisely* branding – so they collectively decided to agree not to risk losing the important messaging just for the sake of *Choosing Wisely* branding.



A sample workflow process to engage patients about *Choosing Wisely* from implementation toolkit.

Doing What Works

The public's perspectives on reducing the use of unnecessary, harmful or wasteful healthcare services

A report to:

The California Statewide Workgroup on Reducing Overuse and Integrated Healthcare Associations' *Choosing Wisely*® project: Decreasing Inappropriate Care in California

April 2016

"Discussions like this are important to me... when people ask your opinion, it's probably because they want to do something in your favor. So I have a good feeling about this." — DWW participant

CENTER FOR HEALTHCARE DECISIONS
where there are no easy answers

California’s Center for Healthcare Decisions helped lead a statewide workgroup to develop and implement strategies to reduce unnecessary care. Through research, the workgroup produced “Doing What Works,” a report on the priorities and values of public and private sector health plan members as they relate to specific strategies for reducing potentially harmful and/or wasteful medical interventions.

Messaging/Marketing

One lesson that grantees felt was important was to realize that what resonates most with health care consumers is the threat of personal, physical or financial harm from overuse – and not the threat of global or population-based harm. As grantees thought through how to message and market to health care consumers, they learned to focus on personal implications. When thinking about messaging and marketing, multiple grantees stated that it was an immense advantage to work with already established marketing groups within partner organizations (and specifically within health plans). More than one grantee mentioned that if they were to do a similar project, they would partner with a marketing team or firm instead of a medical specialty society or association. Another key lesson learned was thinking through how to make a microsite successful, which requires the crucial step of actively driving users to it. Finally, in order to successfully message *Choosing Wisely* across partner organizations and community groups, two grantees wished they had set up a more formal, structured learning environment to fully align messaging and understanding of the complexities of their work.

Collaboration

In addition to establishing strong relationships across grantee partners and organizations, the following were the best practices given for successful team collaboration:

- Holding in-person meetings when feasible, and using a web-cam based webinar sessions as an alternative;
- Having well-structured monthly team calls;
- Having contracts with written deliverables, with money tied to them, and making sure that those contracts span the duration of the grant;
- Adding team meetings to already existing gatherings so that people do not need to travel multiple times; and,
- Having food and wine at in-person meetings, and turning them into networking and happy hour sessions.

Consumer Materials

The *Choosing Wisely* materials that grantees said they used most frequently with consumers are below, listed in no particular order:

- Wallet cards
- Rack cards (on all topics for which they existed)
- Posters (specifically, on “Five Questions” and antibiotics)
- Antibiotics tri-folds
- “Five Questions” banners
- Animated videos
- Anything related to back pain or opioids

Grantees discussed the importance of being able to co-brand materials and request (and get) materials that did not previously exist but were important for their particular populations.

5 QUESTIONS to Ask Your Doctor Before You Get Any Test, Treatment, or Procedure

- 1 Do I really need this test or procedure?
- 2 What are the risks and side effects?
- 3 Are there simpler, safer options?
- 4 What happens if I don't do anything?
- 5 How much does it cost, and will my insurance pay for it?

© 2015 Consumer Reports

“Five Question” wallet cards were among the materials most frequently used with consumers.

