



Shared Care Engagement Process

SHARED CARE ENGAGEMENT PROCESS

Shared Care ("SC") initiatives are helping to strengthen relationships between family and specialist physicians, fostering mutual trust and respect, which are integral to effective collaboration and collegiality. Funding and project support from the Shared Care Committee is enabling family and specialist physicians to work together within their communities to develop solutions to local challenges to their effective shared care of patients. There are no one-size-fits-all solutions. Stakeholder engagement should be a collaborative, encouraging, and creative process.

The following is a set of basic guidelines for effective engagement prior to and throughout Shared Care project funding:

- 1 Initiative Liaisons may be contacted for Shared Care information through a number of ways:
 - Directly by a local Division of Family Practice ("DoFP") staff, Board of Directors, or Local Steering Committee.
 - By an individual family or specialist physician.
 - By an individual or group who has learned about the Shared Care Committee and its initiatives (via JCC Pre-Forum, newsletters, etc.).
- 2 The Initiative Liaison will follow up with the interested individual or group by telephone, email, or in person to qualify the request.
 - If the request comes from a local DoFP, follow-up is typically done with the Project Lead interested in leading a project, the Division's Executive Director, its Board of Directors Chair/Member, or its local Steering Committee.
 - At this meeting the Initiative Liaison explains the mandate of the committee, the aim of Shared Care initiatives, and highlights some of the key steps to moving forward with a Shared Care project.
- 3 If there is interest in moving forward, the individual or group may wish to coordinate an orientation with the Shared Care Initiative Liaison for further information. The Initiative Liaison will answer any questions the individual or group may have and provide advice on next steps.
- 4 The Initiative Liaison will follow up with the Project Lead soon after the orientation to provide the Project Funding Request Template and any other documents, links, or information that will be useful to the interested individual or group in moving forward.
- 5 The Project Lead identifies priorities within the community with family and specialist physicians.



PROCEDURES

- The Project Lead will organize an engagement session in which physicians from the community are invited. This may be done in person, as a survey, or other via another method, as appropriate.
 - Some family and specialist physicians within communities have already identified their top priorities and are ready to move forward with submitting a funding request. Some family physicians within communities have not identified their priorities or the priorities of local specialist physicians and may require further engagement sessions in order to move forward.
- 6 Identified priorities/issues/concerns are incorporated into the writing of the funding request. The Project Lead will use the Funding Request Template to develop and submit an Expression of Interest (EOI) to conduct further engagement sessions and incorporate findings into the writing of a full Proposal.
 - A budget must be included with the EOI submission. See Project Funding Guidelines for detailed information on writing an EOI and full Proposal.
 - The Shared Care Initiative Liaison will provide guidance and answer any questions throughout this process. The document must involve/include feedback from key physicians/stakeholders.
 - EOIs and Proposals must have endorsement from all stakeholder groups (FP/SP Leads, Collaborative Services Committee, DoFP Board, etc.).
 - The Shared Care Initiative Liaison brings forward the funding request and accompanying documents to the Shared Care Committee for approval.
 - Upon approval, a funding transfer agreement is signed and funds are given to the fund holder.
- 7 The Project Lead establishes the project foundation.
 - Project representatives develop support functions and structures; this may include forming their project's Local Steering Committee and passing its terms of reference.
- 8 The Shared Care Initiative Liaison provides ongoing coaching and support to the project team. The Shared Care Initiative Liaison:
 - Works closely with the Project Lead and provides guidance and coaching on project management, quality improvement, and change management.
 - Participates on a few of the advisory committees, as required.
 - Participates on the local project steering committee.
 - The Project Lead provides ongoing updates (bi-monthly project status reports) to the Initiative Liaison who compiles all the information and reports to the Shared Care Committee.

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