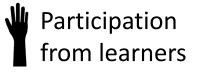
Patient Engagement







Agenda

Торіс	Time
Introduction	15 minutes
The Why	30 minutes
The Spirit	30 minutes
OARS	45 minutes
Break	15 minutes
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Change Talk	45 minutes
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Barriers/Health Literacy	45 minutes
Barriers/Culture and Language	30 minutes
Assumptions	15 minutes
Wrap-Up	15 minutes

Welcome! House Keeping

Patient Engagement

No one in control of content has any relevant financial relationships with ineligible companies.

Successful completion of the Patient Engagement course includes:

- Attendance at the entire session if attending live virtual must have audio and see the slides live
- Completion of the course post test within 5 business days post live event: need to have a score of 80% or greater on the post-test
- Completion of the course evaluation within 5 business days post live event
- Participate in a phone practice session with a course presenter

Nursing:

- Upon successful completion of the Patient Engagement the participant will earn 5.5 Nursing CE contact hour.
- Michigan Institute for Care Management and Transformation is approved as a provider of nursing continuing professional development by the Wisconsin Nurses Association, an accredited approver by the American Nurses Credentialing Center's Commission on Accreditation.

Social Work:

- Upon successful completion of the Patient Engagement participant will earn 5.5 Social Work CE contact hours.
- Michigan Institute for Care Management and Transformation is an approved provider with the Michigan Social Work Continuing Education Collaborative. Approved provider Number: MICEC 110216.

Registered Dietitian:

• Upon successful completion, Registered Dietitians can use the MICMT Nursing CE certificate for their CPEUs. See CDRnet core criteria for details https://www.cdrnet.org/core-criteria

Virtual Etiquette

Video and Audio:

- Unless distracting, please turn video ON. This is crucial for building trust and engagement.
- Test your video and audio before the meeting begins.
- Try to look at the camera when talking (to mimic the feeling of in-person eye contact).
- When possible, try to use good camera quality and sound.
- Adjust your camera if it is too high or low.

Meeting:

- Please hold off eating during the meeting as it can be distracting.
- Try not to multitask too much or make sure you're muted.

Environment:

- Be aware of your backgrounds to not be distracting.
- Position yourself in the light.
- Find a quiet place to join or mute yourself as necessary.

Michigan Institute for Care Management and Transformation (MICMT)

WhoPartnership between University of Michigan and BCBSMWe ArePhysician Group Incentive Program (PGIP)

Goal of MICMT

To help **expand** the adoption of and access to **multidisciplinary care teams** providing **care management** to populations served by the physician community in order to **improve care coordination** and **outcomes** for patients with complex illness, emerging risk, and transitions of care.



[Insert Organization Name]

Who We Are [Insert text]

[Insert Logo]

7

Successful Completion of Patient Engagement includes:

- Attend the entire Patient Engagement course, in-person or live virtual Attendance criteria:
 - If the Learner misses > 30 minutes; the Learner will not be counted as "attended" and will need to retake the course.
 - If the Learner misses < 30 minutes; the Learner will be counted as "attended". The Learner will need to review the missed course content located here: <u>https://micmt-cares.org/training</u>
 - If course is virtual must attend by audio and video/internet
- Complete the Michigan Institute for Care Management and Transformation (MICMT) Patient Engagement **post-test** and **evaluation**.
 - Achieve a passing score on the post-test of 80% or greater. If needed, you may retake the post-test
- Complete simulation.

You will have (5) business days to complete the post-test.

Patient Engagement

Lisa Nicolaou, Northern Physicians Organization Jamie Mallory, Wexford PHO Christen Walters, Integrated Health Partners Erika Perpich, Olympia Medical Lynn Klima, Cure Michigan Ewa Matuszewski, MedNetOne/PTI Curriculum developed in partnership with:

Sarah Fraley, MICMT Sue Vos, MiCCSI Robin Schreur, MiCCSI Tiffany Turner, Infinity Counseling Ruth Clark, Integrated Health Partners











WEXFORD/CRAWFORD PHYSICIAN HOSPITAL ORGANIZATION



Infinity Consulting









Patient Engagement Curriculum Development

- Please provide the following as an appropriate reference if you use this material:
 - "Material based off of the Patient Engagement course developed through a collaborative effort by the following Michigan organizations: NPO, Wexford PHO, IHP, Olympia Medical, Cure Michigan, PTI, MICMT, MiCCSI, Spectrum Health, and Infinity Counseling."
- Questions about using or replicating this curriculum should be sent to: <u>micmt-requests@med.umich.edu</u>. Please follow this link to apply to become an approved trainer for this curriculum: <u>www.micmt-cares.org</u>

Introductions



Please introduce yourself:

• Name

- Name of practice and where it's located
- What you "do" in your role
- The type of patient you enjoy working with and the type of patient that's a little frustrating

Learning Outcome

Participants will be able to explain at least one patient engagement approach in talking with patients about their health.

Objectives

- **Describe** the patient-centered approach of MI
- Explain the conversation style that is the Spirit of MI
- **Demonstrate** basic MI skills
- **Discuss** how to use patient language cues (change talk and resistance) in the application of MI skills
- Explain how to engage the patient in the four processes in MI necessary for health behavior change
- Identify barriers to patient engagement and behavior change
- Identify how to make cultural adaptations to MI

Agenda

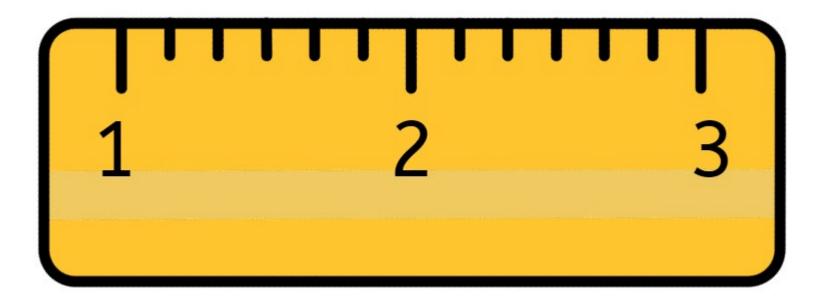
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Objective

Describe the patient-centered approach of MI

Motivational Interviewing Why

Ruler Assessment



Definition

Motivational interviewing is a **collaborative**, **person- centered**, **guiding** method designed to **elicit and strengthen motivation** for change.

Patient Engagement 5.18.2022

Looking Through a New Lens

Standard Approach	Motivational Interviewing Approach
Focused on fixing the problem	Focused on the patient's concerns and perspectives
Paternalistic relationship	Egalitarian partnership
Confront, warn, persuade	Emphasizes personal choice
Ambivalence means that the patient is in denial	Ambivalence is a normal part of the change process
Goals are prescribed	Goals are collectively developed

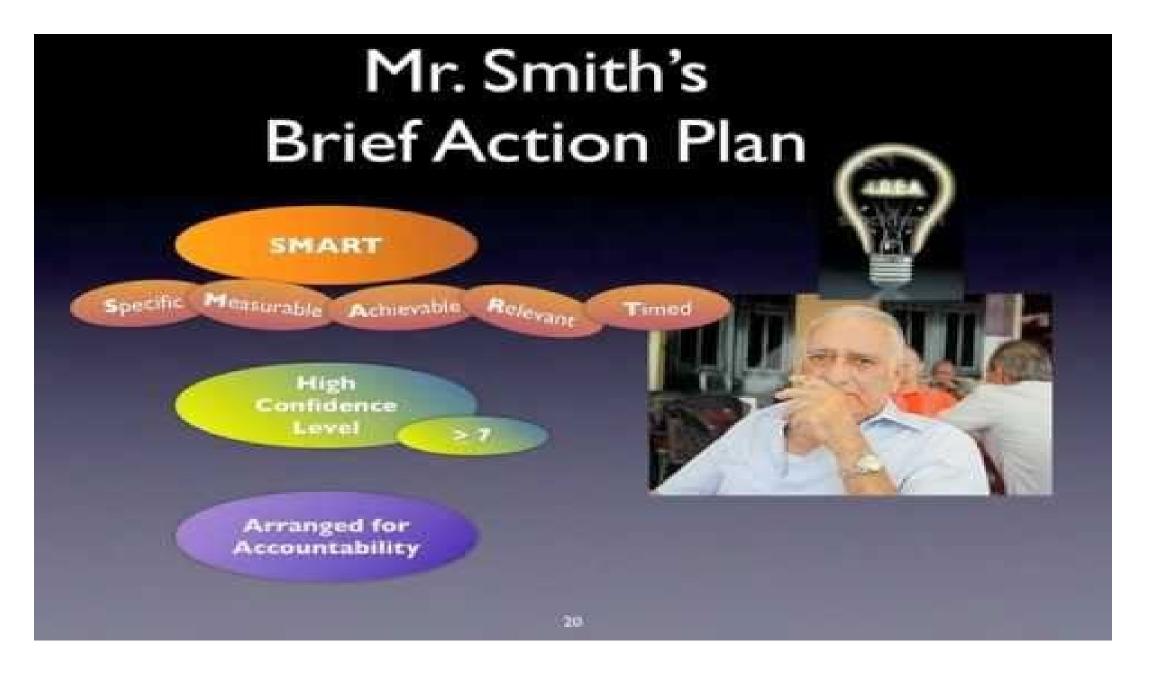


Some practical advice

There's a time and place for everything!

- Leading is appropriate when...
- Following is good when...
- Guiding with MI is best when...





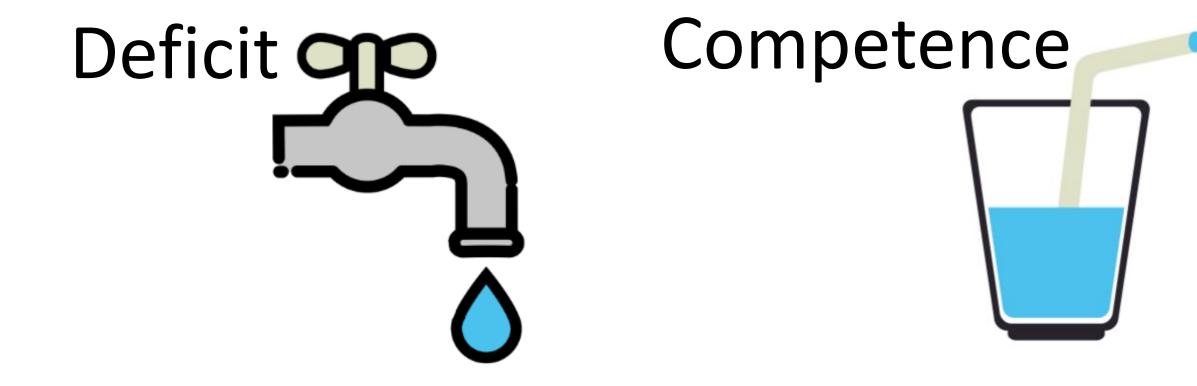


MI facilitates change by:

Helping a person **identify**, **consolidate**, **strengthen**, and **act** upon their intrinsic motivation.



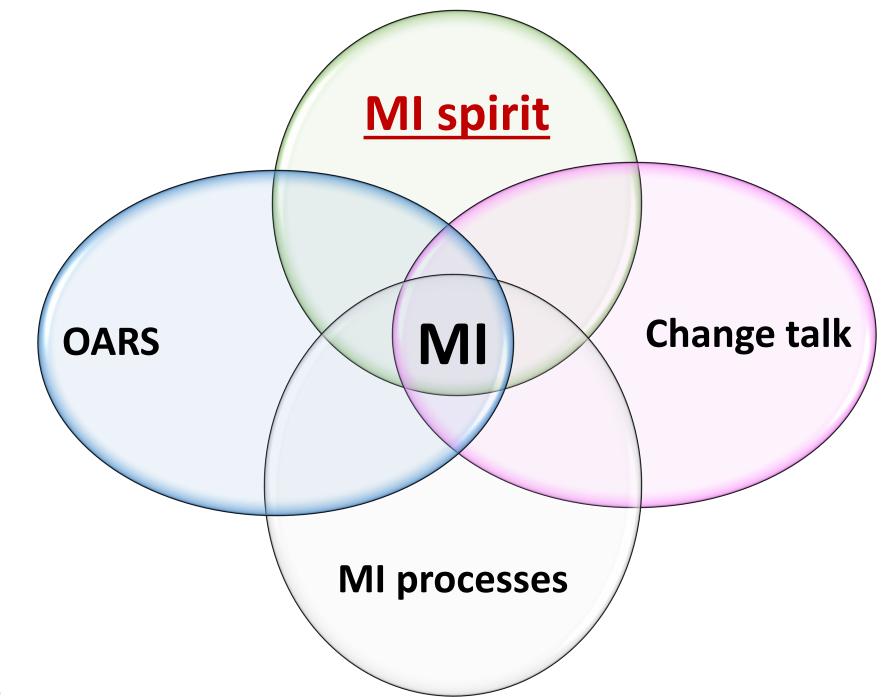
Approach





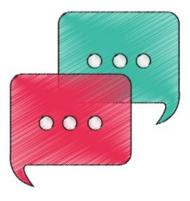
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Objective

Explain the conversation style that is the Spirit of MI



SPIRIT MI

Spirit of MI

Partnership

Acceptance

Evocation

Compassion

Motivational Interviewing Definitions

- **Evocation:** the act of bringing something into the mind or memory.
- Partnership: the state of being a partner.
- Acceptance: the act of accepting something or someone.
- **Compassion:** sympathetic <u>consciousness</u> of others' distress together with a desire to alleviate it.

Try This

Think of a patient who is described as "Non-compliant" by the care team.

Group: What are the characters of the patient that come to mind?



Your Turn Close your eyes



Roll with Resistance

Resistance is what happens when we expect or push for change when the patient is not ready for that change.



Resistance often stems from fear of change.

How we as providers respond to patient resistance is a big determining factor in the outcome of our interaction with that patient and the ability to help the patient move toward behavior change.

https://health.mo.gov/living/healthcondiseases/chronic/wisewoman/pdf/MIRollingwithResistance.pdf

Engaging

Relational foundation

Objective: establish a collaborative working relationship with the other person.



20% rule

Attitudes and Engagement

Not So Helpful Attitudes

- I'll scare you into change.
- I'll get to the bottom of this.
- You are **guilty**.
- Overwhelmed
- I have a solution let me help.

Helpful Attitudes

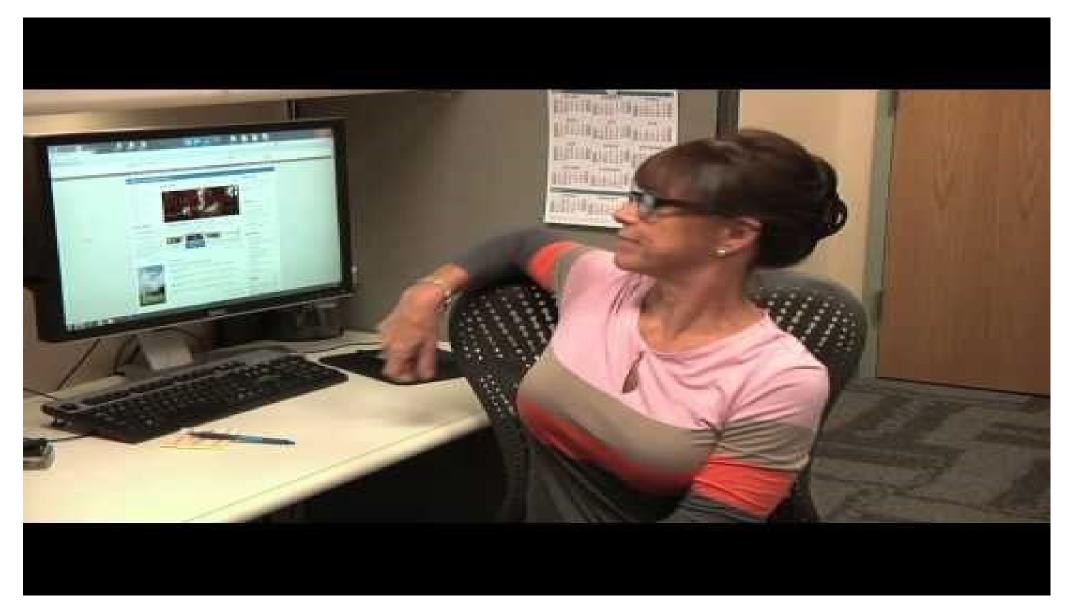
- Curiosity
- Partnership
- Acceptance
- Evocative

Listening: Expressing Empathy





Deskercise





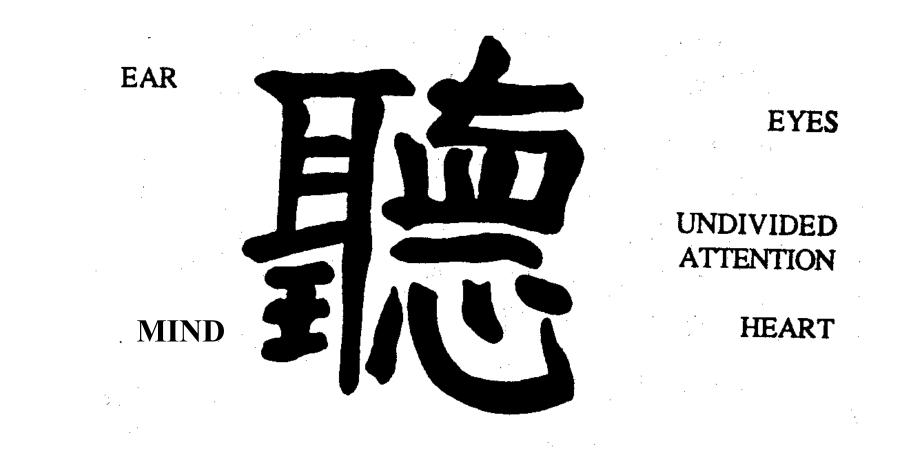
Using the Spirit of Motivational Interviewing during Engagement



From the other person's perspective:

- Do I feel respected?
- Does this person listen to and understand me?
- Do I trust this person?
- Do I have a say in what happens in our work together?

Spirit of Motivational Interviewing Engagement Skill: <u>Listening</u>



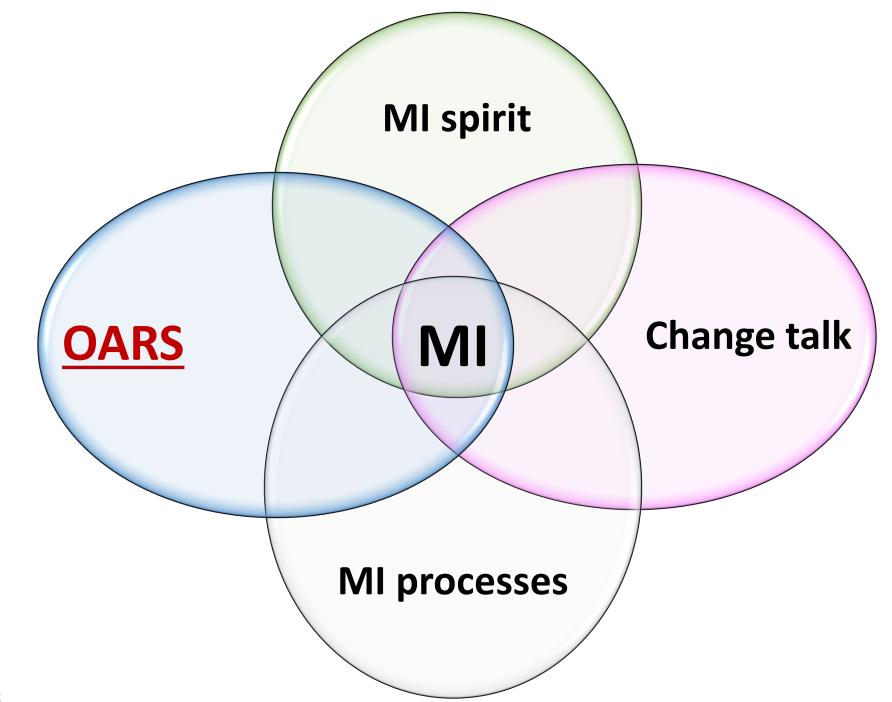
Professionals are experts in diseases. Patients are experts about their own lives.

https://healthydebate.ca/opinions/patients-as-experts The risk of equating "lived experience " with patient expertise, Frank Gavin 2/13/19



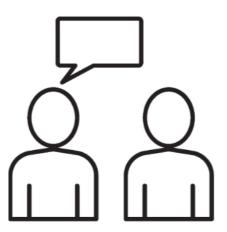
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Wrap-Up	15 minutes



Objective

Demonstrate basic MI skills



O.A.R.S+I

Open Ended Questions **A**ffirmations **R**eflective Listening **S**ummaries +Information Offering



Open Ended Questions

- Many patients have never been asked how they feel about their health or what they would like to change.
- Asking questions can also help us understand why a patient may not be making progress.
- Questions help in the engagement process.



Open VS Closed Questions

When to use closed:

- Fact finding
- Confirming knowledge/understanding
- Limited patient response





When to use open:

- Exploring
- Encourage client to give voice to thoughts, feelings, experiences, opinions, values, and motivations

Closed VS Open Ended Questions Exercise

- What has helped you to manage your stress?
- Do your knees hurt while walking?
- Have you ever tried quitting smoking?
- What are you currently doing to maintain your health?
- Do you check your blood sugar daily?
- Can you tell me more?
- What sorts of things are you eating these days?
- Are you exercising?
- How's your sleep?
- Have you taken any medicine?



Open Ended Questions Activity

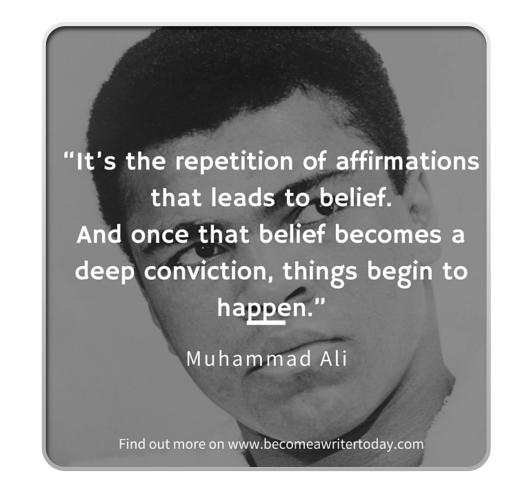
Patient Engagement 5.18.2022

	Diabetes	Hypertension	Depression
WHEN			
WHO			
WHERE			
WHAT			
HOW			

Affirmations (O.A.R.S. +I)

Things to affirm:

- Strengths and attributes
- Past successes future hopes
- Struggles and desires
- Current or past efforts to improve things
- The humanity and character of patient



Affirmations (O.A.R.S. +I)

- Most affirmations are reflections, but not all reflections are affirmations.
- Shy away from using the word "I" and focus on "you" language.

You've taken a big You must have a lot of You are the kind step today, and of person who courage to come in clearly have a lot today, despite your cares a lot about of determination. strong reservations. other people.

Reflections (O.A.R.S. +I)

Reflections have the effect of encouraging the other person to **elaborate**, **amplify**, **confirm**, or **correct**.

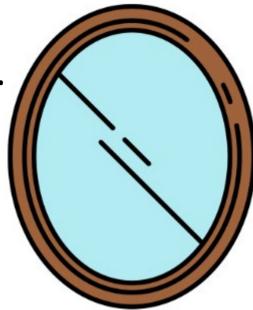
Listen to understand, not to respond.

Reflect Reflect Reflect Bellect Bellect Bellect

Forming a Reflection

- Best guess about what the person means.
- In general, reflection is shorter than client statement.
- Voice inflection goes down at the end.
- Things to reflect on:

Strengths Change Talk Ambivalence



Levels of Reflection



Simple Reflection

- Repeat: uses same language
- **Rephrase**: uses new words
- Stabilizes conversation



Complex Reflection

- Paraphrase: best guess of unspoken meeting
- Moves conversation forward

Sample Reflections

Smoking helps relieve my stress.

• Simple: You're less stressed when you smoke.



Sample Reflections



No, I don't want to quit smoking.

• Simple: You're not ready to quit.

Sample Reflections

You don't know what it's like to quit smoking.

• Simple: Quitting is difficult for you.

Reflections Activity (in the moment)

- "I've tried to quit smoking more times than I can remember."
- "When I stop smoking I get crazy and restless."
- "Thinking about quitting is easy. Doing it is another story."
- I should quit for my children."
- "How am I going to cope with cravings?"
- "I don't think I'll ever be able to lose weight. I'm too lazy and I like eating too much."
- "It's really hard to find time to exercise and eat well when I've got two little ones at home."
- "My down-fall is fast food. I think I'm addicted to french-fries."

Active Listening





Summaries



Focus on strengths and change talk

Offer summary then ask a follow-up question

- Closed: Did I get it all?
- **Open:** What if anything did I miss?

Use to transition into brief action planning

- Offer summary with follow-up question
- Ask "so what's your next step?"
- Set SMART goal

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How to Respond to a "No"

- Mine for the strengths (they showed up to an appointment, agreed to meet/talk, etc.)
- Thank them
- Follow-up question (i.e. "we have X amount of time together. What – if anything – would you like to talk about?")



O.A.R.S+I

Open Ended Questions **A**ffirmations **R**eflective Listening **S**ummaries +Information Offering



Information Offering (O.A.R.S. +I)

Explore: Ask what the client knows, has heard, or would like to know

Offer: With permission, offer information in a nonjudgmental way

Explore: Ask client about thoughts, feelings, and reactions to information



Readiness Ruler

Using a scale to determine:

- Importance
- Readiness
- Confidence



Putting OARS-I in the Water Activity

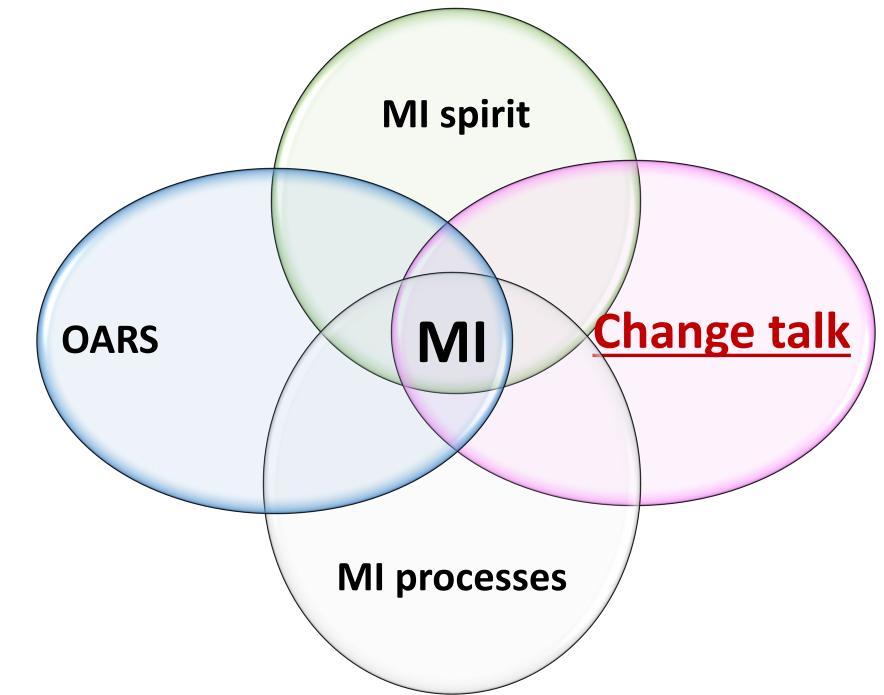


Patient Engagement 5.18.2022



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Lunch	30 minutes
Lunch MI Processes	30 minutes 60 minutes
Lunch MI Processes Barriers/Health Literacy	30 minutes 60 minutes 45 minutes



Change Talk MI

Objective



Discuss how to use patient language cues (change talk and resistance) in the application of MI skills.



Sustain Talk

Any patient speech that favors status quo rather than a movement toward a change goal.

Change Talk

Any patient speech that favors movement

toward a particular change goal.

Focusing for Change

Focus on the negative of continuing the status quo and positives of making change.

- Step back and ask for input
- Consider options
- Share information

Knowing what to listen for

Preparatory change talk



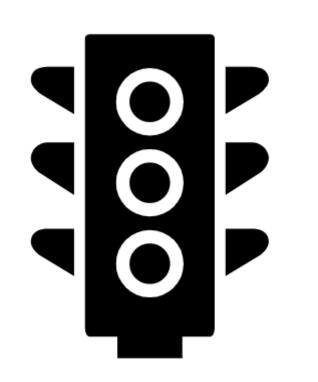
Considering change

• Still some ambivalence

Desire Ability Reasons

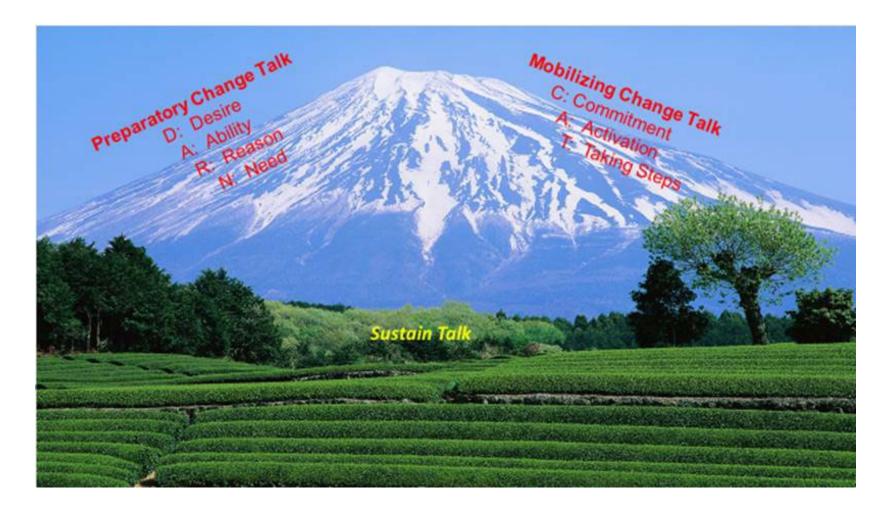
Need

Mobilizing Change Talk



- Resolution of ambivalence
- Intention, decision, readiness
 - Commitment Activation Taking steps

Elevate Change Talk Minimize Sustain Talk



Responding to Change Talk

Reflection

"You don't like the way this makes you feel sometimes, and you're looking for ways you might change things."

Elaboration

"What other concerns have you had about...? What other things have people told you about this? Tell me more about..."

Summarizing

"Let me see if I've got it so far..."(Summarize client statements, including ambivalence).

Affirming

"That sounds like a good idea."

Clarifying Ambivalence

"What do you like about drinking... what is the other side, things you don't like?" (Explore both sides).

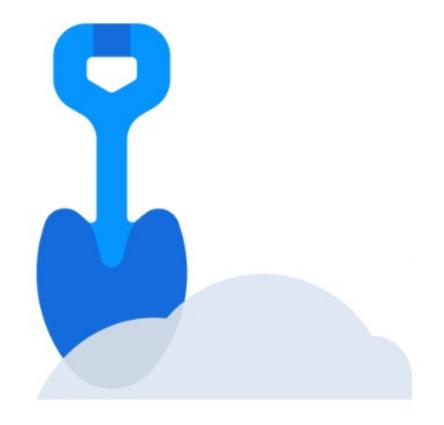
Clarify Values

"Our children are really important to you". (Help move beyond ambivalence, important aspects of tipping the decisional balance in favor of change.

Change Talk Using Reflections

Complex

- Goes beyond what they said
- Aims to capture what they meant
- Deepens understanding
- Forward movement





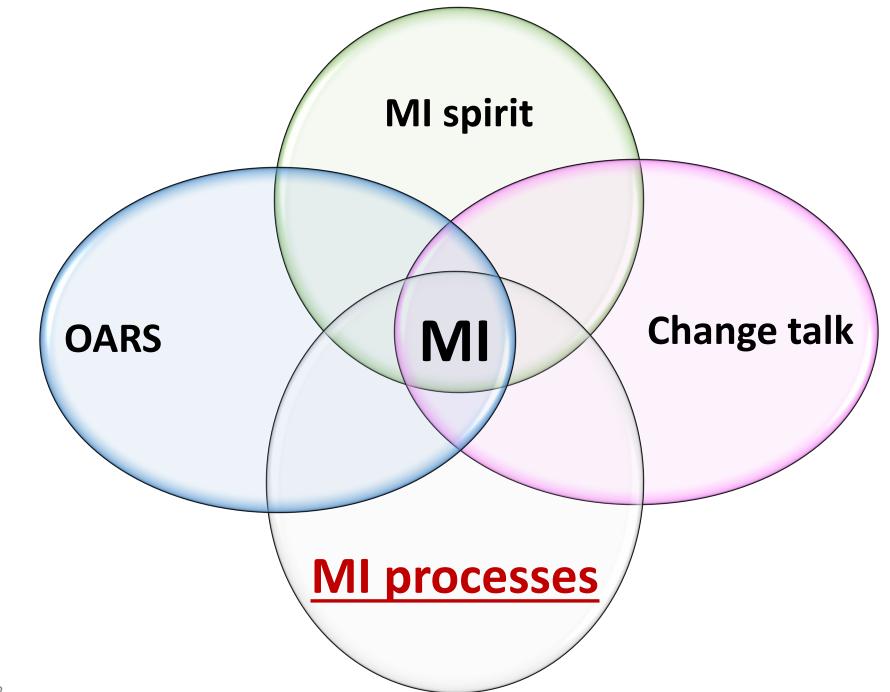
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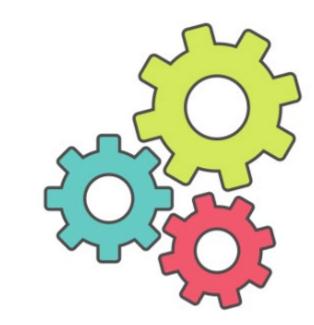
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Objective

Explain how to engage the patient in the four processes in MI necessary for health behavior change

MI Process



Four Fundamental Processes of MI



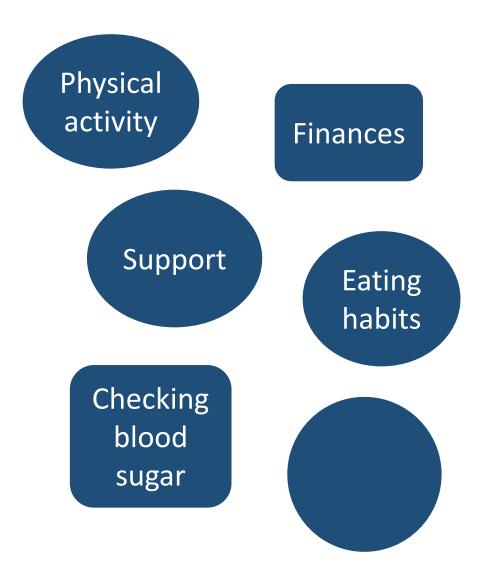
Engaging

- Build rapport with the patient
- Open the conversation
- Style is key!
 - Warm and friendly
 - Support autonomy
 - Curious and open minded
 - Collaborative
 - Listen



Focus We guide, they decide

- Negotiate the agenda and timeframe
- Target behavior (patient self-management goal) vs. outcome goal (doctor care plan)
- Circle chart
 - Blank
 - Pre-filled (SDoH images)
- Of the topics you identified, which might you want to talk about today?
- In the circles are some topics we might talk about today. They include... Which might you want to talk about today? Or is there something else?
- Why did you choose ...?



Focus

What brings you here today? What is going well for your health?

What are you currently doing to maintain your health?

What steps have you taken to better your situation?

What changes are you considering that might impact your health?

What do you already know that you could do to _____?

What have you heard about what you could do to _____?

If a friend of yours were facing something similar, what would you suggest they do? Of all the things we've talked about today, which one would you like to start with? Where would you like to start?

Evoke

- Most time in conversation spent exploring and building importance, confidence and motivation for behavior change.
- Patient makes argument for change.
- Style is key!
 - Curious and open-minded
 - Listening
 - Empathetic
 - Accepting and non-judgmental
 - Optimistic
 - Humble

"People are generally better persuaded by the reasons which they have themselves discovered, than by those which have come into the mind of others." – Pascal

Evoke

- What would be the benefits if you decide to make this change?
- How do you see your life being different if you decide to make this change?
- What are some reasons it's important to you to make this change?
- What are your motivations for making this change?

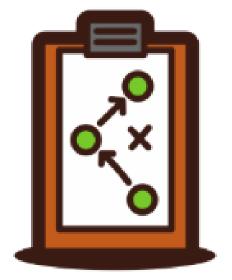
MI Process



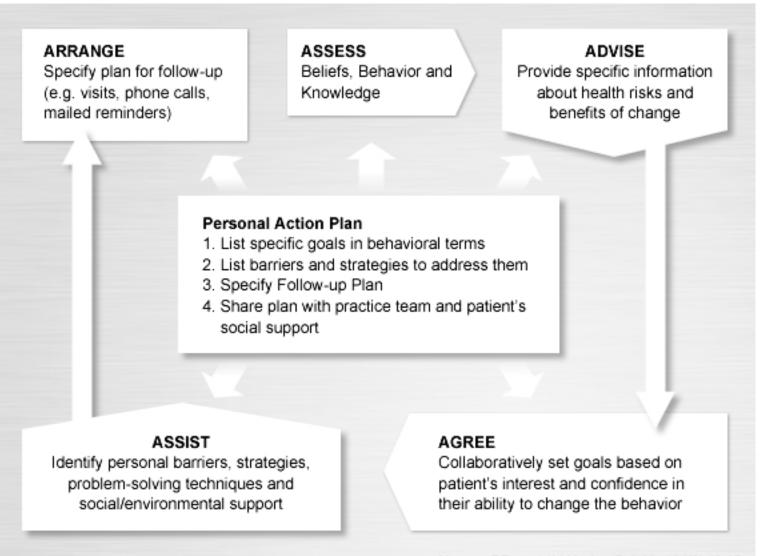


Planning

- Collaboratively developing a specific change plan that a patient is willing to implement.
- Use SMART

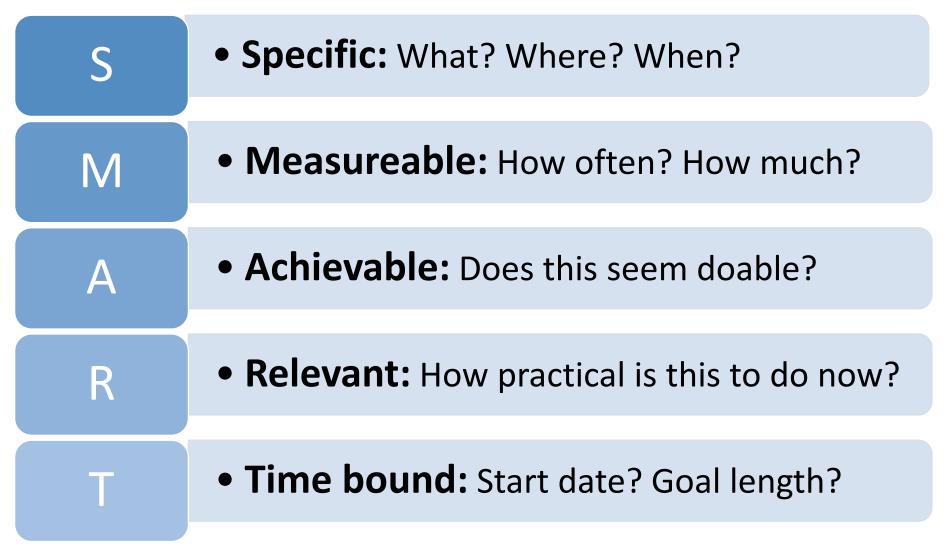


The 5 As of Self-Management Behavior Change



Glasgow RE, et al (2002) Ann Beh Med 24(2):80-87

Planning



Planning

What's your next step? Where do you go from here?



Problem Solving

- What potential barriers do you see that might hinder you from achieving your goal?
- What have you thought of that might help you to overcome any potential barriers?

Confidence Ruler

- What makes you a ____ and not a ____?
- What if anything would help you feel more confident?

Teach back

• We covered a lot of information today and I'd like to make sure I've got everything. So tell me again what your plan is.

Confirm commitment

• Is this what you are going to do?

ACTION PLANS

40% of people are **not ready** to make an action plan.





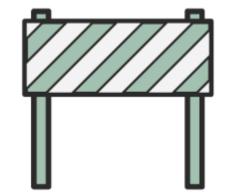
Sometimes the goal is basic: Goal: working with my care team member



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Potential Barriers to Patient Engagement and Behavior Change



Health Literacy

"The degree to which individuals have the capacity to **obtain**, **process**, and **understand** basic health information and services needed to **make** appropriate health **decisions**."

- Ratzan and Parker, 2000 / Healthy People 2010

Objective:

Identify barriers to patient engagement and behavior change.

Health Literacy – AMA





Health Literacy



A **patient's ability** to obtain, understand and act on health information.



A **provider's capacity** to communicate clearly, educate about health and empower their patients.

Impact on Self-Management

21% of the U.S. adults read **below the 9th grade level**.

- Impacts
- Reading prescription labels
- Finding their way in a health care system
- Fully understanding written materials.

Functional Health Literacy

Literacy is not only about reading and writing.

- Listening for understanding
- Evaluating if the message sent was the same as it was received
- Speaking
- The ability to ask questions

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GNINAELC – Ot erussa hgih ecnamrofrep, yllacidoirep naelc eht epat sdaeh dna natspac revenehw uoy eciton na noitalumucca fo tsud dna nworb-der edixo selcitrap. Esu a nottoc baws denetsiom htiw lyporposi lohocla. Eb erus on lohocla sehcuot eht rebbur strap, sa ti sdnet ot yrd dna yllautneve kcarc eht rebbur. Esu a pmad tholc ro egnops ot naelc eht tenibac. A dlim paos, ekil gnihsawhsid tnegreted, lliw pleh evomer esaerg ro lio.

Why are patients at risk?



Reliance on the written word for patient instruction



Increasingly complex healthcare system

More medications More tests and procedures Growing self-care requirements Esoteric language

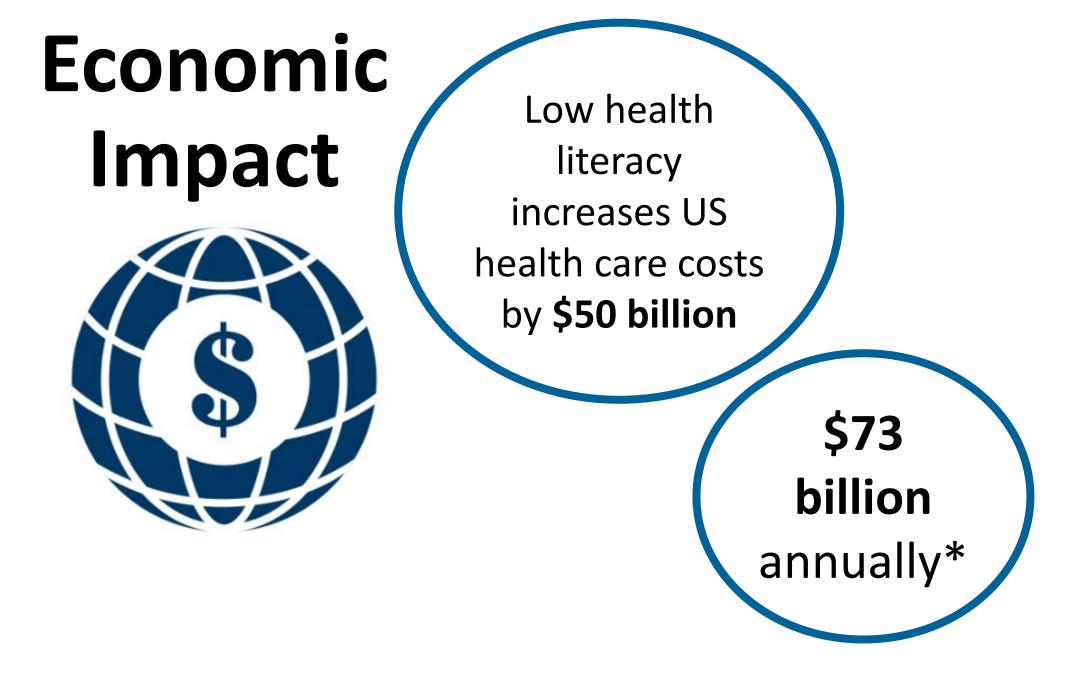
Who is at risk?

- Elderly
- Ethnic and racial minorities
- Limited education
- Immigrants
- Low socioeconomic status
- People with chronic disease

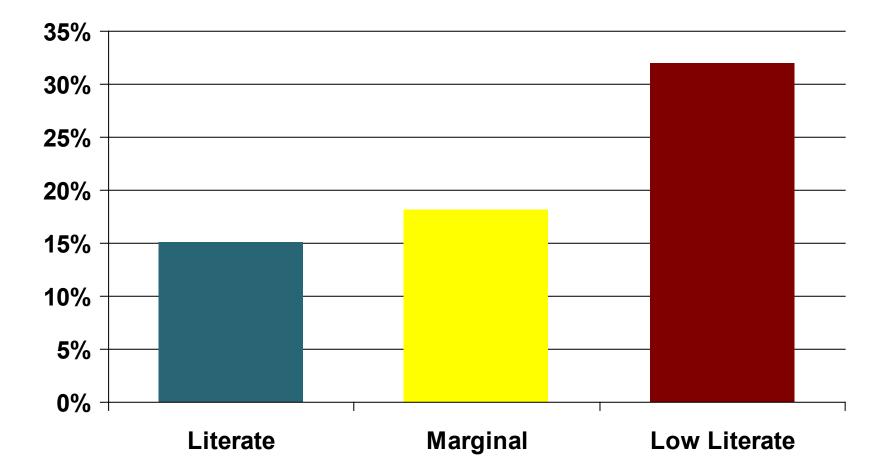


Case Study Discussion

- Jonathan is a 14-year-old adolescent recently discharged from a mental health unit. This was his fourth admission over an 18-month period. His mother assumed responsibility for seeing that he took his medications as directed. His mother knew the names of his medications and faithfully monitored his taking of them. But Jonathan's behavior began to deteriorate again.
- At one of Jonathan's follow-up visits, the nurse asked him to show her the meds he was on, and how he was taking them. It turned out that Jonathan's mother couldn't read, got the meds mixed up, and was administering the daily med three times a day, and the TID medication once daily.



Low Literacy Leads to Re-hospitalization



Recognizing the Red Flags



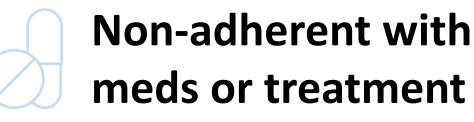


Perceived Resistance



Frequently Missed Appointments, Tests





Creating a Shame Free Experience

Convey an attitude of helpfulness, caring and respect – by all staff

- Ask questions to help patients open up
- Listen
- Encourage patients to ask questions
- SMILE 🙂

Provide assistance confidentially



Strategy: Improve interpersonal communication

Slow down

- Take your time
- Use plain, non-medical language
- "Living room" language



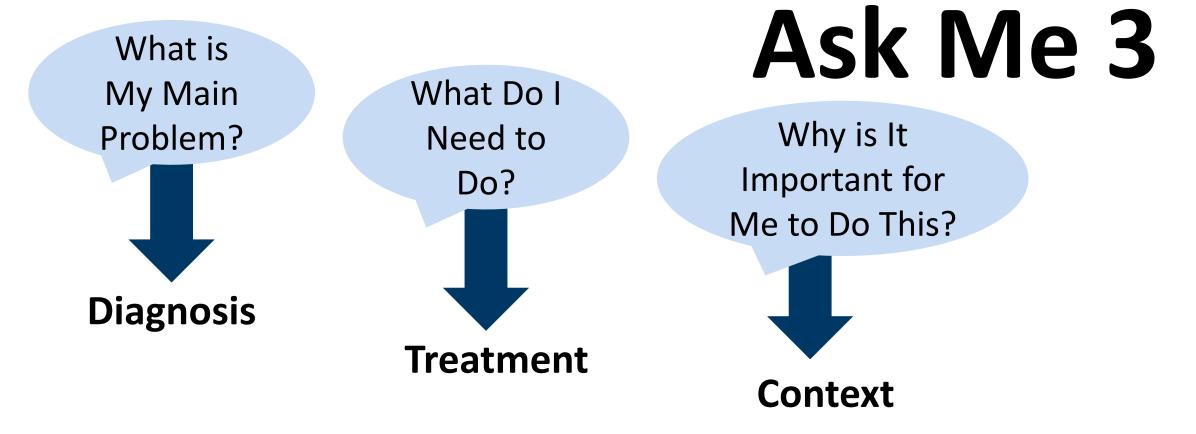
Strategy: Improve interpersonal communication

Use analogies and pictures

- Charts
- Models
- Diagrams
- Limit to most important concepts
- Focus on 1-3 key messages
 Repeat them



Strategy: Empower patients



Strategy: Use teach-back method

Asking patients to demonstrate understanding:

- What will you tell your spouse about your condition?
- I want to be sure I explained everything clearly, so can you please explain it back to me so I can be sure I did?
- Show me what you would do.

Chunk and check:

• Summarize and check for understanding throughout, don't wait until the end.

Do NOT ask...

• Do you understand?



"Understanding is a two-way street."

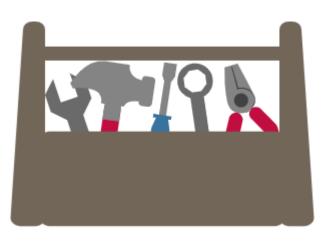
-Eleanor Roosevelt



Strategy: Identify Assessment and Support Tools

Tips

- Medi-Babble Application (<u>http://medibabble.com/</u>)
- Living Room Language Dictionary (see hand out)





Agenda

Торіс	Time
Introduction	15 minutes
The Why	30 minutes
The Spirit	30 minutes
OARS	45 minutes
Break	15 minutes
OARS	30 minutes
Change Talk	45 minutes
Lunch	30 minutes
MI Processes	60 minutes
Barriers/Health Literacy	45 minutes
Barriers/Culture and Language	30 minutes
Assumptions	15 minutes
Wrap-Up	15 minutes

Motivational Interviewing and Culture

Objective

Identify how to make cultural adaptations to MI



Background

- Studies from the United States have shown that when compared with European-Americans, racial, ethnic minorities and other cultural minorities are often less likely to utilize mental health services.
- Culturally adapted **Motivational Interviewing is still emerging**, and virtually all efforts have been conducted within the Latino American and American Indian populations.
- Motivational Interviewing has been tested extensively and utilized among the Native American community in New Mexico.

Basic Definition of Culture

- Culture is a system of beliefs, values, and assumptions about life that guide behavior and are shared by a group of people.
- It includes **customs**, **language**, and **material artifacts** which are transmitted from generation to generation, rarely with explicit instruction.

Group Activity:

Everyone Has a Culture and Everyone Is Different

- Think about what language you speak at home.
- Think about what food you eat.
- Identify the music you listen to most often.
- In your family, what is considered polite and what is considered rude?
- What manners have you been taught? (Think about behavior toward a healthcare professional, spiritual leader or an elder.)

Cultural Adaptation of MI

- Care team members should inquire about the cultural values and beliefs of the patient (such as personability, respect, and trust), which could influence communication.
- Identify the **areas of conflict or mismatch** between the intervention and the patient.
- Modify the intervention to become compatible with a person's culture, often by changing the language, content, concepts, goals, and/or methods.
- Rather than pathologizing cultures for their shame-inducing tendencies, recognize the strength and resilience that these cultures provide.

End-Result of Cultural Adaptation

Intervention that is more natural or familiar intellectually and emotionally accessible to the patient may result in **enhanced efficacy**, **satisfaction**, and **retention**.



Self-Awareness

Care team members should be aware of their **own values and biases**, and how these may **influence perceptions** of the patient, the patient's need, while addressing the issue.

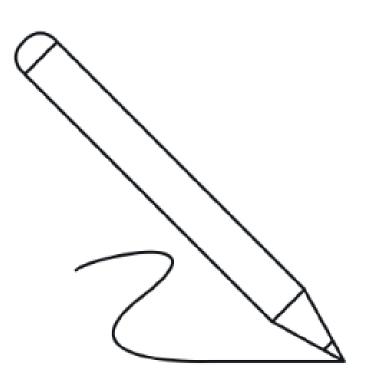


Assumptions about self-care can cause harm.

https://minoritynurse.com/assumptions-about-self-care-can-cause-harm/

Tips...

- Have the care team member disclose more personal information
- Inquire about ethnic background (i.e. identity, language, spirituality, and ties to the community)
- Avoid stereotypes
- Acknowledge historical traumas and losses (including discrimination)
- Exhibit greater cultural competence about celebrations, ceremonies, and traditions





- Reflect on biases
- Focus on strengths
- •Use humor
- Use metaphors, myths, and storytelling
- Ask the patient about potential solutions to their own problems

Culture and Motivational Interviewing, Patient Educ Couns. 2016 Nov; 99(11): 1914–1919.



Agenda

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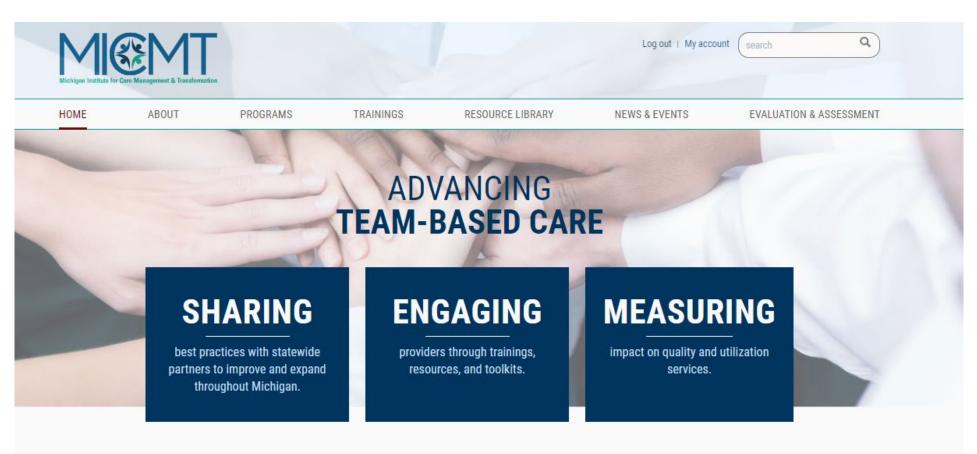
Reminder: Successful Completion of Patient Engagement includes:

- Completion of the one day **in-person/virtual training**.
- Completion of the Michigan Institute for Care Management and Transformation (MICMT) **post-test** and **evaluation**.
- Achieve a passing score on the post-test of 80% of greater.
 *If needed, you may retake the post-test.
- Complete simulation.

You will have (5) business days to complete the post-test.

MICMT Resources

https://micmt-cares.org/



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- Centre for Collaboration Motivation and Innovation <u>https://centrecmi.ca/brief-action-planning/</u>