

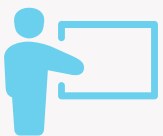
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Fundamental Drivers of Successful Navigation Programs

First introduced in the 1990s, patient navigator programs—which link people and families to community-based health and social services—have emerged as a primary strategy to address barriers and inequitable access to care.

2 NAVIGATOR RECRUITMENT & TRAINING

Thorough and ongoing training support ensures the care team's understanding of, commitment to and confidence in the intervention—factors directly impacting program adoption.



- Orientation to patient population
- Growth & development
- Problem solving for complex cases

1 PATIENT CHARACTERISTICS

People's needs, interests and values directly impact program design and complexity. It is crucial to first determine a clear vision of patients' priorities and design a program for that vision.



- Language barriers & cultural values
- Geographic restriction
- Complexity of patients & their needs

3 ROLE CLARITY

A clear articulation of clinicians', navigators' and patients' roles and responsibilities mitigates confusion and reinforces shared ownership of care.



- Defined role boundaries with patients & physicians
- Valuing role clarification
- Management of anxiety when taking on new role to build confidence

4 OPERATIONAL PROCESS

Articulating effective and clear policies, procedures and decision-making processes bolsters assimilation of a new intervention through changes in the existing system structures and ways of working.



- Documentation mechanisms such as clinical intake forms
- Consensus decision-making
- Mechanisms to address scheduling & referral challenges

5 HUMAN, FINANCIAL & TECHNOLOGICAL RESOURCES

Dedicated resources, including adequate time, space and tools, support navigators' ability to provide comprehensive care to large and often complex caseloads.



- Secured external funding
- Appropriate space for navigation work
- Internet & EHR access

6 ORGANIZATIONAL RELATIONSHIPS & PARTNERSHIPS

Strong inter- and intra- organizational partnerships foster community cohesion, increase stakeholder buy in and facilitate the spread and scale of the navigation program.



- Establishing a self-governing team environment
- Developing a community charter & community-based steering committee
- Communication strategies with partner agencies

8 PROVIDER COMMUNICATION

Clear and timely communication with primary care team members, whether face-to-face or through EHRs, increases engagement with the navigation program and promotes routinization.



- Consistent attendance at regular meetings
- Sharing updates on patient progress through EHR
- Communication between all care providers

10 VALUING NAVIGATION TEAMS

Recognizing navigator expertise as equally valuable to that of other care team members is crucial for implementation and long-term program success.



- Providing opportunities for navigators to be recognized & heard

7 RESOURCE LANDSCAPE

An often cited challenge, “navigation to nowhere,” or the lack of local services to address issues such as affordable housing and transportation, highlights the inequities in availability of health and social services—and the need for a thorough assessment of both the local resource landscape and patients’ needs.



- Community assessment before implementing a navigation program
- Exploring resources outside of home communities like telehealth or other technologies

9 END USER ADOPTION & TECHNOLOGICAL RESOURCES

To promote uptake of the intervention, clearly define its advantages and benefits, or “sell” the program to patients and families. Doing this effectively underscores the need to base the design and goals of the program in community needs.



- Tailored recruitment strategies
- Ongoing discussion, pilot testing & observation for program refinement & improvement
- Addressing potential stigma for participation in mental health programs

11 COMMITMENT TO PROGRAM EVALUATION

Programs should demonstrate a commitment to tracking progress toward mission and goals, problem-solving for improvement and collecting, analyzing and disseminating results back to the community.



- Using pre-identified evaluation indicators
- Considering community-based research approaches
- Addressing potential problems with lack of access to data