Manaaki Ngātahi:

Te mahi tahi me ngā kiritaki, ngā whānau, me te hapori mō te manaaki hauora hapori te take

Partnership in Care:

Consumer, whānau and community engagement in primary and community health care

June 2025

Te Tāhū Hauora
Health Quality & Safety Commission

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Te whāinga | Document purpose

Primary and community health care is the entry point to the health system for most New Zealanders.[1] This includes health care providers outside of hospitals, such as general practitioners, nurse practitioners, nurses, midwives, health improvement practitioners, pharmacists, physiotherapists, aged care providers, Kaupapa Māori providers, primary health organisations (PHOs) and other non-governmental organisations providing health services.

This resource helps primary and community health care providers strengthen consumer, whānau and community engagement in primary care, and aligns with the Code of expectations for health entities' engagement with consumers and whānau (the Code of expectations).[2] It offers context and examples of important elements to support this work.

View the Code of expectations for health entities engagement with consumers and whānau.

Te Tāhū Hauora Health Quality & Safety Commission (the Commission) has a responsibility to support consumer, whānau and community engagement across the health sector. Contact us for further guidance and advice: consumers@hqsc.govt.nz.

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[1] Ministry of Health. (nd). *Primary and community health care – Ngā ratonga hauora mātāmua me ngā ratonga ā-hapori*. URL: www.health.govt.nz/strategies-initiatives/programmes-and-initiatives/primary-and-community-health-care (accessed 16 May 2025).

[2] Te Tāhū Hauora Health Quality & Safety Commission. 2022. *Code of expectations for health entities' engagement with consumers and whānau*. Wellington: Health Quality & Safety Commission. URL: www.hqsc.govt.nz/consumer-hub/engaging-consumers-and-whanau/code-of-expectations-for-health-entities-engagement-with-consumers-and-whanau (accessed 16 May 2025).

He kupu whakataki | **Introduction**

Primary and community health care has direct contact with communities, often being the first point of contact for many people needing health care. It is crucial it promotes and enables consumer, whānau and community engagement because evidence consistently shows this engagement leads to greater patient safety and clinical effectiveness.

PHOs and general practices are well placed to lead consumer, whānau and community engagement in primary and community health care. However, all health providers play a vital role in engaging consumers, whānau and communities to improve their experience and co-design solutions that work for those accessing, delivering and overseeing services.

This guide will support you and your health service to improve health outcomes for all through meaningful engagement with consumers, whānau and communities.

Ngā kawenga ā-ture | **Legislative responsibilities**

Aotearoa New Zealand legislation underpins consumer engagement.

Pae Ora (Healthy Futures) Act 2022

The Pae Ora (Healthy Futures) Act 2022 sets out health system principles to provide common expectations across the health system. The principles require the health system to:

- be equitable
- engage with Māori, population groups and others to reflect their needs and aspirations
- provide opportunities for Māori to exercise decision-making authority
- provide a choice of quality services to Māori and other population groups
- protect and promote people's health and wellbeing.[3]

The Ministry of Health is responsible for administering the Pae Ora (Healthy Futures) Act 2022.

Read the Pae Ora (Healthy Futures) Act 2022 and the six Pae Ora strategies,[4] including:

- New Zealand Health Strategy
- Pae Tū: Hauora Māori Strategy
- Te Mana Ola: The Pacific Health Strategy
- Health of Disabled People Strategy
- Rural Health Strategy
- Women's Health Strategy.

Code of expectations for health entities' engagement with consumers and whānau

The Code of expectations for health entities' engagement with consumers and whānau sets the expectations for how health entities must work with consumers, whānau and communities in the planning, design, delivery and evaluation of health services.

Read the Code of expectations for health entities' engagement with consumers on Te Tāhū Hauora Health Quality & Safety Commission's website.

Code of Health and Disability Services Consumers' Rights

The Code of Health and Disability Services Consumers' Rights establishes the rights of consumers, and the obligations and duties of providers to comply with this code. It is a regulation under the Health and Disability Commissioner Act 1994.

Read the Code of Health and Disability Services Consumers' Rights on the website of the Health and Disability Commissioner.

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[3] Ministry of Health. (nd). *About the Pae Ora (Healthy Futures) Act*. URL: www.health.govt.nz/about-us/new-zealands-health-system/overview-and-statutory-framework/pae-ora-healthy-futures-act#toc-0-1 (accessed 16 May 2025).

[4] Ministry of Health. 2024. *Pae Ora (Healthy Futures) for all New Zealanders*. URL: www.health.govt.nz/strategies-initiatives/health-strategies/pae-ora-strategies (accessed 16 May 2025).

Mārama ana ki te mahi tahi me ngā kiritaki, ngā whānau, me te hapori | **Understanding consumer, whānau and community engagement**

Consumer, whānau and community engagement is essential to improving quality and safety within the health system.[5] It should be seen as an investment in the improvement of our long-term health outcomes.

At its heart, this is about seeing, hearing and valuing consumers, whānau and community in your care. It requires consumers, whānau and communities to be 'at the right table, at the right time, in the right way'.

This engagement supports the improvement of health outcomes for all New Zealanders. By focusing on consumers, whānau and communities with the greatest health needs – including Māori, Pacific peoples, disabled people, members of the LGBTQIA+ community and people living rurally – their unique needs and experiences become visible.

Consumers can be engaged as individuals, whānau or collectively, increasing their opportunity to influence the quality and safety of the services they receive.[6] The extent of their engagement ranges from having options and the opportunity to provide feedback about their own healthcare experiences to having a meaningful voice in partnership with providers to influence the design and delivery of services.

Consumer, whānau and community engagement is more than just a set of activities. It involves a cultural shift in services to welcome partnerships with consumers, whānau and communities at all levels,[7] from the waiting room to the board room.[8]

At the direct care level, this means working towards shared decision-making. At the service planning level, it means ensuring consumer, whānau and community feedback from patient experience surveys, advisory groups and other forms of feedback tools directly influence quality improvement initiatives.[9] At the policy and governance level, it means skilled, well-connected consumer networks working on an equal footing with those in clinical governance and reporting to boards.

Providing avenues for giving ongoing feedback to consumers, whānau and communities about how their feedback has influenced service design and delivery is integral to any partnership strategy.

When services engage with consumers, whānau and communities at all levels, this is true partnership in care.[10]

Definitions

- The term 'consumer' is anyone who has used, is currently using and may use health services. Appropriate lived experience should be sought to inform specific areas of interest.
- Whānau is generally described as a collective of people connected through a common ancestor (whakapapa) or as the result of a common purpose (kaupapa).[11] Defining who is included in a whānau is determined by the person. It is an opportunity to provide a collective voice and collective decisions.
- The term 'community' is defined as people with a common interest, location or identity often interacting and feeling a sense of belonging.

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[5] Doyle C, Lennox L, Bell D. 2013. A systematic review of evidence on the links between patient experience and clinical safety and effectiveness. *BMJ Open* 3: e001570. DOI: 10.1136/bmjopen-2012-001570 (accessed 16 May 2025).

[6] *Ibid.*

[7] Te Tāhū Hauora Health Quality & Safety Commission. 2024. *Collaborating for quality: a framework for clinical governance.* Wellington: Te Tāhū Hauora. URL: www.hqsc.govt.nz/resources/resource-library/collaborating-for-quality-a-framework-for-clinical-governance/ (accessed 16 May 2025).

[8] Coulter A. 2012. *Leadership for patient engagement*. London: The King's Fund, p 16. URL: https://archive.kingsfund.org.uk/concern/published_works/000104281?locale=en (accessed 23 May 2025).

[9] Bergerum C, Engström AK, Thor J, Wolmesjö M. 2020. Patient involvement in quality improvement – a 'tug of war' or a dialogue in a learning process to improve healthcare? *BMC Health Serv Res* 20(1):1115. DOI: 10.1186/s12913-020-05970-4. PMID: 33267880; PMCID: PMC7709309 (accessed 16 May 2025).

[10] Cox R, Molineux M, Kendall M, et al. 2022. Co-produced capability framework for successful patient and staff partnerships in healthcare quality improvement: results of a scoping review. *BMJ Qual Saf* 31: 134–146.

[11] Te Puni Kōkiri and the Treasury. 2019. *An Indigenous Approach to the Living Standards Framework*. Wellington: Te Puni Kōkiri and the Treasury. URL: https://www.treasury.govt.nz/sites/default/files/2019-01/dp19-01.pdf (accessed 11 June 2025).

Benefits of consumer, whānau and community engagement

Engaging consumers, whānau and communities is essential for shaping healthcare systems that are responsive, inclusive and effective.[12]

By involving consumers, their whānau and communities in decision-making, planning and the delivery of care, healthcare services can better address individual needs, improve outcomes and foster stronger relationships. This approach not only empowers people to take an active role in their health but also enhances the overall quality and accessibility of care, ensuring it is both timely and compassionate.

Established evidence shows engaging consumers, whānau and communities leads to:

- better health and care outcomes
- safer care
- enhanced service delivery and governance
- more satisfied consumers and health providers (staff retention)
- improved culture within the organisation or service
- meaningful change and mutual learning[13]
- lower cost and less waste of care delivery and gives better value for money.[14, 15]

When consumers, whānau and communities are engaged by health providers, they can share ideas that are appropriate to their environment, which can, in turn, improve access to healthcare.[16] Engaging with consumers, whānau and communities can improve their health literacy, support engagement with treatment and medication, and help them better self-manage long-term conditions. It empowers them to be informed decision-makers in care planning.

Consumers, whānau and communities bring unique and valuable perspectives from outside the health system 'looking in'. Ensuring diverse representation from within a community or region builds shared ownership of services and, ultimately, improves the quality and experience of care.

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[12] Standards New Zealand Te Mana Tautikanga o Aotearoa. NZS 8134:2021. Ngā Paerewa Health and Disability Services Standard. URL: www.standards.govt.nz/shop/nzs-81342021 (accessed 16 May 2025).

[13] Consumer engagement improves access to services. See: Bombard Y, Baker GR, Orlando E, et al. 2018. Engaging patients to improve quality of care: a systematic review. *Implementation Science* 13(1): 98. DOI: 10.1186/s13012-018-0784-z (accessed 16 May 2025).

[14] The Health Foundation. 2016. *Person-centred care made simple: what everyone should know about person-centred care*. London: The Health Foundation. URL: www.health.org.uk/sites/default/files/PersonCentredCareMadeSimple.pdf (accessed 16 May 2025).

[15] Doyle C, Lennox L, Bell D. 2013, *op. cit.*

[16] World Innovation Summit for Health. 2013. *Patient and family engagement: partnering with patients, families, and communities for health: a global imperative*. Doha: World Innovation Summit for Health, p 6. URL: https://www.imperial.ac.uk/media/imperial-college/institute-of-global-health-innovation/public/27425_WISH_Patient-Engagement_web.pdf (accessed 23 May 2025).

Te anga arataki mō te Tautoko, te Mārama, te Urupare me te Aromatawai

SURE (Supporting, Understanding, Responding and Evaluating) framework

The SURE framework highlights examples and measures of what successful consumer, whānau and community engagement looks like and how it improves the quality and safety of health services.

View the full SURE framework.

Domains

The framework consists of three domains.

- Te tūhononga | **Engagement** – the environment created to support consumer, whānau and community engagement.
- Te noho urupare | **Responsiveness** – responding to and acting on what consumers, whānau and communities are saying and having the right information at the right time for those accessing services.
- Wheako | **Experience** – the systems in place to gather consumer, whānau and community experiences, and act upon the results.

Each domain draws on all or most of the principles of the Code of expectations, where relevant. Organisations can use the framework to measure their level of engagement with consumers, whānau and communities and identify where improvements can be made.

The improvement categories range from 'Minimal' (score of 1) to 'Consultation' (score of 2), 'Involvement' (score of 3) and 'Partnership' and shared leadership (score of 4).

Te tūhononga | **Engagement**

The environment created to support consumer, whānau and community engagement.

These elements are designed to provide advice and support for providers to work in partnership with consumers, whānau and communities. They should be worked towards over time.

Examples of core elements

- Organisations consider the needs, values and aspirations of Māori when developing clinical strategies.
- Organisations demonstrate cultural safety values in the planning of consumer, whānau and community engagement activities. This may require specific training for cultural safety – including recognition of diverse cultural practices, values and protocols – and understanding bias.
- The needs of underserved groups are included in health care design and delivery.
- Clinical priority action plans are co-created between the health workforce and consumers, whānau and their communities.
- Organisations resource and support staff and team members to value consumer, whānau and community engagement. This can be achieved through training and workshops and by providing culturally tailored materials and language support.

  Visit the Māori and Pacific tiles on the Commission's Consumer hub site.
- Champions of consumer, whānau and community engagement are identified and promoted at all levels of organisations and services.
- Consumers are involved when inducting new staff and team members in organisations, to help demonstrate the importance of consumer-, whānau- and community-centred care.
- Organisations resource facilitator and/or manager roles focused on consumer, whānau and community engagement.
- Organisations confirm with consumers, whānau and communities the skills required to best partner with them. This could include ways to receive feedback through active listening, giving room and respect for their concerns and opinions, and checking back for understanding, to help improve their health literacy.[17]
- When meeting consumers, health professionals take the time to listen and understand what is important to the person and their whānau.[18]
- Organisations provide a welcoming environment for consumers and whānau. Ensure those who are the first point of contact in your service know the importance of getting the first interaction right. It often sets the pattern for the consumer and/or whānau experience for the rest of the visit.
- Organisations and their staff are respectful and genuine with consumers and whānau; be interested and show empathy.
- Consumer, whānau and community representatives are included at senior leadership levels of organisations, including on PHO boards.
- Organisations include consumers as independent participants in learning review focus groups when reviewing harm events.

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[17] See Te Tāhū Hauora Health Quality & Safety Commission. (nd). *Three steps to better health literacy – a guide for health professionals*. Wellington: Te Tāhū Hauora Health Quality & Safety Commission. URL: www.hqsc.govt.nz/assets/Consumer-hub/Partners-in-Care/Publications-resources/health-literacy-booklet-3-steps-Dec-2014-1.pdf (accessed 16 May 2025).

[18] See Te Tāhū Hauora Health Quality & Safety Commission. (nd). *Let's P.L.A.N. for better care: Four steps for your next health care visit*. URL: https://www.hqsc.govt.nz/resources/resource-library/lets-plan-for-your-next-health-care-visit/ (accessed 16 May 2025).

Te noho urupare | Responsiveness

Responding to and acting on what consumers, whānau and communities are saying and having the right information at the right time for those accessing services.

These elements are designed to provide advice and support for providers to work in partnership with consumers, whānau and communities. They should be worked towards over time.

Examples of core elements

- Consumers, whānau and community are included in their own care planning. Their values, preferences and goals of care are included when considering treatment options. Mechanisms are in place to ensure consumers, whānau and communities have decision-making authority in their care management plans.
- Organisations support the use of shared care electronic records enabling the consumer to access notes as desired.
- Choosing Wisely is an international initiative that aims to bring clinicians, consumers, whānau and communities together to discuss options for care and treatment (eg, polypharmacy).

  Visit the Choosing Wisely webpage.
- Organisations implement shared goals of care discussions, should the consumer deteriorate in aged care or during hospital admission.

  Visit the Shared goals of care webpage.
- Organisational leadership commits to using feedback from consumers, whānau and communities, including complaints, to monitor the quality of care. This requires consumer engagement at all levels.
- Consumer and whānau experiences are central to understanding and learning from harm events. Organisations can build from their perspectives, to enable a broader understanding of how harm occurs and identify opportunities for improvement.[19]
- Organisations focus on supporting consumers, whānau and communities to increase their health literacy using targeted outreach, tailored materials and language support, as needed.
- Organisations work with communities to tailor educational resources for those who use their services.
- Consumers, whānau and communities participate in review processes and activities, such as credentialling.[20]
- Organisations analyse and understand data from primary care patient experience surveys, and other forms of consumer whānau and community feedback, and respond to findings.
- Organisations discuss care options with ongoing support and, where possible, map appropriate consumer journeys through an episode of care.
- Organisations ensure they provide information for consumers, whānau and communities that meets accessibility requirements,[21] so they can make informed decisions.
- Organisations tailor the design and layout of facilities and clinical service areas with and for the communities being served.

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[19] Te Tāhū Hauora Health Quality & Safety Commission. 2021. *National Adverse Events Reporting Policy.* URL: www.hqsc.govt.nz/our-work/system-safety/healing-learning-and-improving-from-harm-policy/national-adverse-events-reporting-policy/ (accessed 16 May 2025).

[20] Ministry of Health. 2010. *The Credentialling Framework for New Zealand Health Professionals.* Wellington: Ministry of Health. URL: www.health.govt.nz/publications/credentialling-framework-for-new-zealand-health-professionals (accessed 16 May 2025).

[21] Digital Govt NZ. 2025. *Web Accessibility Standard 1.2.* URL: https://www.digital.govt.nz/standards-and-guidance/nz-government-web-standards/web-accessibility-standard-1-2 (accessed 23 May 2025).

Wheako | Experience

The systems in place to gather consumer, whānau and community experiences, and act upon the results.

These elements are designed to provide advice and support for providers to work in partnership with consumers, whānau and communities. They should be worked towards over time.

The elements provide multiple avenues, methods and systems for health consumers, whānau and communities to engage in delivering and designing healthcare services. The methods for consumer engagement could include, but are not limited to, establishing consumer advisory groups, community forums or meetings, workshops, surveys and feedback forms. Culturally tailored materials and language support should be included as needed. The systems we embed include consumer engagement policy, terms of reference and the regular review of these systems.

Examples of core elements

- Organisations identify, develop and implement mechanisms to consistently bring partnership, group knowledge and activities back to communities.
- Organisations promote diverse representation when establishing advisory groups and community forums.
- Organisations undertake research and use existing consumer, whānau and community feedback resources to avoid engagement fatigue.
- Organisations collect information on consumer, whānau and community lived experience to inform quality improvement.
- Data governance and management, including consumer, whānau and community feedback, align with privacy, ethical and confidentiality requirements.[22]
- Co-design clinical priorities, processes and evaluations collectively, with consumers, whānau and their communities involved at all levels of the health system.
- Organisations ensure mechanisms are created to support communication between health services, including hospitals, and pharmacy and community services, avoiding duplication and repetition.
- Organisations establish consistent and adaptive feedback processes to close the loop, which include how consumer, whānau and community input has influenced service design and delivery.
- Organisations embed vision statements for consumer, whānau and community engagement. When the values of the service are person-centred, the service values consumer, whānau and community engagement.
- Organisational leadership (including senior leaders) champions consumer, whānau and community engagement by supporting the development and enactment of consumer, whānau and community engagement policy and processes.
- Organisations resource facilitator and/or manager roles focused on consumer, whānau and community engagement in services.
- Consumers, whānau and community members are supported and reimbursed in their expert advisory group, committee and/or clinical governance roles.
- Organisations share consumer stories of lived experience in team, management and board meetings.
- Organisations link with consumer forums, groups and councils to enable their input to projects and ensure system integration.
- Consumers, whānau and community members have strong representation on clinical governance groups and chair or co-chair clinical governance activities, where appropriate.

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[22] National Ethics Advisory Committee. 2019. *National Ethical Standards for Health and Disability Research and Quality Improvement*. Wellington: Ministry of Health. URL: neac.health.govt.nz/publications-and-resources/neac-publications/national-ethical-standards-for-health-and-disability-research-and-quality-improvement (accessed 16 May 2025).

He kupu whakatepe | **Conclusion**

This resource aims to enable the primary and community healthcare sector to progress engagement with consumers, whānau and communities. It may be used as a starting point for some or complement existing efforts for others.

The following is certain.

- The health sector has responsibilities under legislation to engage with consumers, whānau and communities to uphold their rights when decisions are being made and when accessing health services.
- Involving consumers, whānau and communities in the design of services will improve services and health outcomes.
- Evidence shows that consumer, whānau and community engagement gives better value for money.[23]
- Partnership with consumers, whānau, communities and providers should be underpinned by the principles and tools used in co-design.
- Meaningful consumer, whānau and community representation requires planning and well-supported infrastructure.
- Responding to what consumer experience data, consumer, whānau and community feedback tell services is essential for a continuous learning environment and quality improvement.
- Using a framework suited to your service and designed with communities helps providers understand and progress consumer, whānau and community engagement.

Bringing this together requires a readiness to engage and dedication to building and valuing relationships to achieve health quality for all.

Te Tāhū Hauora Health Quality & Safety Commission has a responsibility to support consumer, whānau and community engagement across the health sector. Contact us for further guidance and advice: consumers@hqsc.govt.nz.

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[23] Doyle C, Lennox L, Bell D. 2013, *op. cit.*

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