



Taking action for the  
future of healthcare,  
grounded in the  
realities of today

# A ROADMAP FOR ACTION

THE BERYL  
INSTITUTE  
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# Welcome to The New Existence Roadmap for Action

This moment in our shared history has called on us to act with agility, to rise up and collaborate, and to persevere in caring for others. It also revealed the opportunities we have to build a better healthcare system that meets the needs of all it serves in every corner of the world. For this reason, guided by a **global steering team** and informed by the voices of our community, The Beryl Institute undertook an effort to help frame a new view for the future of healthcare. The result was *The New Existence*.

The New Existence is grounded in the evidence that drives healthcare today and will lead us to a better tomorrow by ensuring high quality, safe, human-centered and equitable outcomes. Its principles are based on:

- the proven impact of listening to, communicating with and engaging patients, family members and care partners as integral partners in care
- the critical opportunity to acknowledge and understand the burdens on our healthcare workforce and to care for and support their needs.
- the unwavering commitment to all in the communities we serve to dismantle disparities and break down the barriers to equitable care around the world.
- the clear intention to work better together, collaborate and share learning with one another, through and beyond this moment.

This roadmap is designed by the community for the community. It is open-access and available to all. It is framed not as one-size-fits-all but as a tool for reflection and consideration and a framework for action. Focusing on what we have learned from this moment in time, it is designed to help us rebuild and move forward with agility and strength. This roadmap allows you to determine the best path for you and for your organization. It offers a place to find the resources you need. It also provides an opportunity for a shared commitment to collaboration, learning and supporting others on

their journeys. It ultimately represents the foundational ideas on which our community is built and will carry forward to *The New Existence*.

The roadmap provides four distinct, but complementary perspectives from which to approach this work – Executive Leadership, Experience Champion/Leader, Healthcare Team Member, and Patient, Family Member, Care Partner. It is intended to support you in identifying your needs through a simple assessment process, establishing key action sets and aligning you with a growing, community-generated library of resources to support your success.

These ideas and actions reflect a journey we must take, not just a destination at which we should arrive. They frame a better future for healthcare to which we must aspire and require a consistent commitment to action to ensure. This is not and must not be an initiative, for initiatives eventually end. Rather, this roadmap and associated actions represent an understanding that to achieve the best in human experience, our efforts must truly never stop. It is a commitment we all share and a journey we are inspired to travel together.



# A Declaration for Human Experience

The New Existence provides a foundational framework for action in our efforts to transform the human experience in healthcare. The following Declaration for Human Experience from The Beryl Institute frames our shared call to action in how we can and must move forward.

**Our shared experience over the past year has shifted the foundation of healthcare forever, exposing systemic weaknesses and wounds that can no longer go untreated.** Immersed in a global pandemic, we acted with agility and urgency to innovate at a pace never seen before.

**Healthcare professionals and organizations never hesitated to respond to the needs of patients and the communities they serve,** even as hospitals overflowed with patients, adequate staffing and supply levels grew challenging and exhaustion overwhelmed the healthcare workforce. As COVID-19 cases and deaths climbed higher, the devastating impact of systemic disparities, inequities and injustices faced by people of color and marginalized populations became painfully apparent.

**While the world has been inspired by the level of compassion and care that healthcare professionals have demonstrated time and time again, this service and sacrifice has come with a heavy price.** With the clouds of COVID-19 beginning to lift, the real impact of trauma and an ever-increasing demand for rapid change is looming over a healthcare workforce that was showing signs of stress and burnout years before the pandemic.

**Although these issues are not new, this moment has exposed the shortcomings in our approach and the need for a fundamental shift in thinking and direction.** We are now at a critical inflection point. There is no normal to which to return; and those who slide back, either intentionally searching for the comforts of the past or due to lack of clarity on how to push forward, are likely to become obsolete in a new world.

**Our current realities call us to forge a new existence that begins with looking beyond the distinct silos of patient experience, employee engagement or community health to focus on the common thread that binds each of these areas together—the human experience.** By elevating

and transforming the human experience in healthcare, we can create a more effective, responsive and equitable healthcare system that results in better experiences and outcomes for patients of all backgrounds, a more supportive, energizing and collaborative environment for healthcare professionals and healthier communities that break down barriers to care.

**We are called to lead courageously with the understanding that we are, first and foremost, human beings caring for human beings. In answering this call, we commit to:**

- Acknowledge and dismantle systemic racism and prejudice, tackle disparities and provide the highest-quality, most equitable care possible.
- Understand and act on the needs and vulnerabilities of the healthcare workforce to honor their commitment and reaffirm and reenergize their purpose.
- Recognize and maintain a focus on what matters most to patients, their family members and care partners to ensure unparalleled care and a commitment to health and well-being.
- Collaborate through shared learning within and between organizations, systems and the broader healthcare continuum to forge a bold new path to a more human-centered, equitable and effective healthcare system.

In making this declaration personally and publicly, we stand for all we can and must be in healthcare. In aligning our words and actions to move this cause forward, we commit to transforming the human experience in healthcare for all patients, the healthcare workforce and the communities we serve.

**Join the global commitment by signing this historic declaration at [transformHX.org](https://transformHX.org).**





# The New Existence: A Framework for Action – Core Segments and Key Aims

The New Existence framework is comprised of 4 core segments, comprised of a set of 11 key aims and associated actions. You can find the full framework in Appendix A.

## Care Teams

Redefine and advance the integrated nature of and critical role patients and their circle of support play on care teams.

- Redefine the care team
- Invite and activate partnership
- Commit to care team well-being

## Governance & Leadership

Reimagine, redefine and reshape the essential role of leadership in driving systematic change.

- Create transparency across the healthcare ecosystem
- Restore and nurture confidence
- Transform healthcare in collaboration with diverse voices

## Models of Care & Operations

Co-design systems, processes and behaviors to deliver the best human experience.

- Co-design intentional, innovative and collaborative systems
- Innovate processes of care to transform behavior

## Policy & Systemic Issues

Advocate for equitable institutional, governmental and payor policies, incentives and funding to drive positive change.

- Hardwire human partnership in the healthcare ecosystem
- Research, measure and dismantle the structures and systems that lead to disparities
- Modernize the surveys and democratize the data



# A Roadmap for Action

This guide will lead you through a series of structured steps to support you in taking action on The New Existence. Pathways are provided for four foundational perspectives, and we encourage you to follow the path most closely associated to your role.

Continue effort with next priorities

STEP	PERSPECTIVE			
	Executive Leadership (C-Suite)	Experience Leader/ Champion	Healthcare Team Member	Patient, Family Member, Care Partner or PFA
<b>Step 1. COMMIT</b> Commit to taking action	Commit the organization or healthcare system and identify process owner.	Commit your department, unit, or area of influence.	Commit personally.	Commit personally/Determine volunteer opportunities.
<b>Step 2. REFLECT</b> Complete assessment, reflect on priorities and current focus  The assessment process is found in Appendix C on p. 8.	Review assessment results in relation to current strategic plan and objectives. Why are identified items of greatest importance to your organization? Where are you in/out of alignment?	Review assessment results in relation to your experience plan and objectives. Why are identified items of greatest importance to your organization? Where are you in/out of alignment? How does this relate to your organization's current strategic plan and objectives? Who in your organization is doing this well now?	Review assessment results in relation to your role. Why are identified items of greatest importance to you personally? Who will you need to engage/influence to further address your reflections? How does this relate to your organization's current strategic plan and objectives?	Review assessment results. Why are identified items of greatest importance to you? What is your comfort in reaching out to and who will you need to engage/influence to further address your reflections? What support may you need in doing so? How does this relate to the organization's current strategic plan and objectives?
<b>Step 3. CHOOSE</b> Choose what to do and where to focus first	Identify your top priorities from the assessment based on where you are committed to taking and sup-ported action.	Identify your top priorities from the assessment based on where you are committed to taking and leading action.	Identify your top priorities from the assessment based on where you are committed to influencing and supporting action.	Identify your top priorities from the assessment based on where you are committed to influencing and supporting action.
<b>Step 4. ACCESS</b> Access resources, education and community support  <a href="#">Access resource center</a>	Support process owner in accessing resources and join community conversations related to your top priorities in building a customized plan for your organization.	Access resources and join community conversations related to your top priorities in building a customized plan for your organization.	Access resources and join community conversations related to your top priorities in encouraging your organization to build a customized plan. Engage with Experience Leader/Champion and/or process owner.	Access resources and join community conversations related to your top priorities in encouraging your organization to build a customized plan. Engage with Experience Leader/Champion and/or process owner.
<b>Step 5. ACT</b> Take action and measure impact	Support process owner in formalizing plan of action based on identified priorities. Reinforce effort via public support, ensure needed resources, establish required metrics and engage in regular updates on progress. Ensure accountability and recognize achievements.	Formalize plan of action based on identified priorities. Identify and engage early adopters. Ensure senior leaders express public sup-port. Acquire needed resources, establish required metrics and communicate regular updates on progress. Recognize achievements.	Support and/or encourage plan of action based on identified priori-ties. Express commitment and take personal action. Inform direct leaders and engage peers. Contribute to achieving established metrics.	Support and/or encourage plan of action based on identified priori-ties. Express commitment and take personal action. Share your story. Participate in planning and other co-design opportunities. Contribute to achieving established metrics.
<b>Step 6. SHARE</b> Share your story (of what you accomplished and what you learned)	Engage in sharing your efforts, actions, outcomes and lessons learned with The Beryl Institute community of practice. Provide executive perspective on how you engaged in and supported effort.	Engage in sharing your efforts, actions, outcomes and lessons learned with The Beryl Institute community of practice. Provide champion perspective on how you operationalized and measured effort.	Engage in sharing your efforts, actions, outcomes and lessons learned with The Beryl Institute community of practice. Provide front-line team member perspective on how you influenced action.	Engage in sharing your efforts, actions, outcomes and lessons learned with The Beryl Institute community of practice. Provide patient, family member or care partner perspective on how you raised issues and influenced action.



# APPENDIX A

## The New Existence: A Framework for Action (includes Associated Actions)

### Care Teams

Redefine and advance the integrated nature of and critical role patients and their circle of support play on care teams.

#### Redefine the care team

- Identify care team members, including the patient's family, healthcare providers and the patient's circle of support.
- Orient care team members, including the patient, to their roles, responsibilities and benefits of being an active part of the care team.
- Include a formal care partner as part of the patient's care team and consider peer mentors and cultural brokers and partners.

#### Invite and activate partnership

- Ensure patients and families co-develop the care plan and are an active part of care team interactions and decision-making discussions.
- Identify and act on what matters most to patients, families and the patient's circle of support.
- Identify and eliminate barriers to effective care team partnership.
- Encourage patients and families to serve in roles beyond their own care journey.

#### Commit to care team well-being

- Celebrate and recognize all those providing and receiving care and restore joy in work.
- Monitor and manage trauma, burnout and resilience within all care team members.
- Acknowledge and reduce the stigma associated with mental and behavioral health for all care team members.

### Governance & Leadership

Reimagine, redefine and reshape the essential role of leadership in driving systematic change.

#### Create transparency across the healthcare ecosystem

- Commit to an integrated strategy for improving patient experience.
- Create a culture of trust.
- Facilitate communication among healthcare, research and advocacy organizations.

#### Restore and nurture confidence

- Formalize outreach programs with patients, families, healthcare professionals and communities.
- Actively seek to understand the concerns and needs of patients, families, healthcare professionals and communities.
- Engage all stakeholders in the co-production, design, implementation and evaluation of new and existing initiatives.

#### Transform healthcare in collaboration with diverse voices

- Engage networks of diverse community leaders as partners to transform the health of the community.
- Address the moral and social determinants of health.
- Take direct action to ensure equity in healthcare.

### Models of Care & Operations

Co-design systems, processes and behaviors to deliver the best human experience.

#### Co-design intentional, innovative and collaborative systems

- Create collaborative systems that integrate principles of quality, safety, engagement and well-being.
- Use human-centered co-design to ensure consistent and equitable systems that are personalized and inspire confidence.

#### Innovate processes of care to transform behavior

- Co-design workflows that promote partnership among patients, families, healthcare professionals and communities.
- Solicit and act on feedback at each touchpoint regarding outcomes that matter.
- Develop and apply standardized measures and tools for continuous improvement.

### Policy & Systemic Issues

Advocate for equitable institutional, governmental and payor policies, incentives and funding to drive positive change.

#### Hardwire human partnership in the healthcare ecosystem

- Elevate the expertise of patients and the patient's circle of support.
- Engage patients, families, healthcare professionals and communities in advocacy.
- Remove barriers to accessing care.

#### Research, measure and dismantle the structures and systems that lead to disparities

- Identify where inequity and bias exist within current policies and processes.
- Examine the data to understand the disparities that influence experience and outcomes.
- Dismantle policies and practices that deliver inequitable outcomes.
- Deploy practices that ensure equitable health outcomes.

#### Modernize the surveys and democratize the data

- Diversify the ways in which we capture, hear and listen to patient and family voices across care settings.
- Democratize patient experience survey data to be more transparent, accessible and actionable.
- Modernize patient experience surveys to capture current and relevant information on patient needs and priorities.



# APPENDIX B

## The New Existence Assessment: Aims and Associated Assessment Questions

SEGMENT	AIM	ASSESSMENT STATEMENT
Care Teams	Redefine the care team	We ensure patients, family members and care partners are active members of the care team and are oriented in their roles.
	Invite and activate partnership	We directly engage patients, family members and care partners in co-developing plans of care and decision-making discussions and eliminate barriers to partnership.
	Commit to care team well-being	We consistently work to celebrate and recognize members of the care team and effectively monitor and manage issues of trauma and burnout.
Governance & Leadership	Create transparency across the healthcare ecosystem	We work to create a culture of trust and engage in open communication with other healthcare organizations.
	Restore and nurture confidence	We actively seek to understand and actively address the concerns and needs of patients, families, the healthcare workforce and our community.
	Transform healthcare in collaboration with diverse voices	We engage networks of diverse community leaders as partners to ensure equity and transform the health of our community.
Models of Care & Operations	Co-design intentional, innovative and collaborative systems	We create collaborative systems that integrate principles of quality, safety, engagement and well-being.
	Innovate processes of care to transform behavior	We solicit and act on feedback and apply standardized measures and tools for continuous improvement.
Policy & Systemic Issues	Hardwire human partnership in the healthcare ecosystem	We engage patients, families, healthcare professionals and communities in advocacy and removing barriers to accessing care.
	Research, measure and dismantle the structures and systems that lead to disparities	We work to identify where inequity and bias exist within current policies and processes and deploy practices that ensure equitable health outcomes.
	Modernize the surveys and democratize the data	We diversify the ways in which we capture, hear and listen to patient and family voices across care settings to ensure we have current and relevant information.





# APPENDIX C

## The New Existence Priority Self-Assessment

Please take a few minutes to determine your thoughts on how important the following items are to your organizations and how well you are doing them. You will then be asked to plot your responses on the following page.

ASSESSMENT STATEMENT	How IMPORTANT do you believe this item is to your organization's success?					How WELL do you believe your organization currently addresses this item?				
	Extremely Important	Very Important	Moderately Important	Slightly Important	Not at All Important	Extremely Well	Very Well	Moderately Well	Slightly Well	Not at All Well
1. We ensure patients, family members and care partners are active members of the care team and are oriented in their roles.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. We directly engage patients, family members and care partners in co-developing plans of care and decision-making discussions and eliminate barriers to partnership.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. We consistently work to celebrate and recognize members of the care team and effectively monitor and manage issues of trauma and burnout.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. We work to create a culture of trust and engage in open communication with other healthcare organizations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. We actively seek to understand and actively address the concerns and needs of patients, families, the healthcare workforce and our community.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. We engage networks of diverse community leaders as partners to ensure equity and transform the health of our community.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. We create collaborative systems that integrate principles of quality, safety, engagement and well-being.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. We solicit and act on feedback and apply standardized measures and tools for continuous improvement.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. We engage patients, families, healthcare professionals and communities in advocacy and removing barriers to accessing care.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. We work to identify where inequity and bias exist within current policies and processes and deploy practices that ensure equitable health outcomes.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. We diversify the ways in which we capture, hear and listen to patient and family voices across care settings to ensure we have current and relevant information.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Once you complete the assessment above, plot your responses on the chart below to identify priority items for your efforts. As you review your results, place the number for each item above (1 to 11) in the corresponding boxes for HOW IMPORTANT the item is to your organization's success and HOW WELL your organization addresses this item.

Extremely Important					
Very Important					
Moderately Important					
Slightly Important					
Not at All Important					
	Not Well at All	Slightly Well	Moderately Well	Very Well	Extremely Well

### Results Considerations

Recognizing that all the assessment items are deemed important to The New Existence, some may be of greater or lesser importance to you and your organization's strategy. As you review your results, consider the following:

**Yellow Box Items**  
Areas you deem important, but you are not performing well. Consider these areas as priorities.

**Green Box Items**  
Areas you deem important, and you are performing well.

**Blue Box Items**  
Areas you deem less important to your organization, but you are performing well or made an effort.

**Orange Box Items**  
Areas you deem less important to your organization and you are not performing well. These areas are most likely lower priorities.