Working with Patient and Family Advisors
Webinar 1: Opportunities and Steps for Getting Started

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Learning objectives

• Key elements and goals of patient and family engagement
• What patient and family advisors do and how they can help improve quality and safety
• Steps in the process of working effectively with advisors
• Identify opportunities for working with advisors
What is patient and family engagement?
What is patient and family engagement?

- Involves patients and family members as:
  - Members of the health care team
  - Advisors working with clinicians and leaders to improve policies and procedures

- Reflects an environment where patients, families, clinicians, and staff all work together as partners to improve the quality and safety of hospital care
A working definition

Patients, families, and health professionals Working in active partnership At various levels across the health care system To improve health and health care

Who benefits from patient and family engagement?

• Patients and families
  – Improved health outcomes
  – Better experiences of care

• Clinicians and health care providers
  – Improved satisfaction and retention

• Health care organizations and systems
  – Competitive edge
  – Standards, reimbursement, and requirements
Patient and family advisors:
Who are they?
What do they do?
How do they help improve care?
Advisors: Who they are

- Patients and family members who receive(d) care at your organization and who want to help improve care experiences for others
- Collaborative partners in developing and revising policies, procedures, and practices
- Experiences create qualifications for the role, but...
  - Rigorous application and screening process
  - Training needs to be provided
Advisors: What they do

• Help improve the quality and safety of care through meaningful improvements
  – Give input and feedback
  – Identify potential changes and improvements
  – Plan and implement changes that matter to patients and families

• Serve as partners, educators, speakers, listeners, advocates, collaborators, and leaders

Source: PFANetwork definition, co-written with patient advisors
Advisors: How they help improve care

• Offer insights about what you do well and areas where changes may be needed

• Help develop priorities and make improvements based on patient- and family-identified needs

• Help inspire and generate new ideas and solutions

• Serve as a link to the broader community
Working with advisors:
Getting started
Getting started: 5 steps

1. Create infrastructure necessary for working with patient and family advisors
2. Identify opportunities for partnering with patient and family advisors
3. Recruit, select, and train patient and family advisors
4. Prepare organizational leaders, clinicians, and staff to work with advisors
5. Implement, coordinate, and celebrate!
1. Create infrastructure

• Designate who will oversee work with advisors
  – Recruit, train, and support advisors
  – Identify and create opportunities
  – Prepare staff and clinicians to work with advisors

• Determine where advisors sit in your organizational structure
2. Identify opportunities

- Identify issues that would benefit from patient and family input and involvement
- Determine the most appropriate mechanisms for partnering with patients and families
  - Advisors on one-time efforts
  - Advisors on short-term projects
  - Patient and family advisory councils
  - Advisors as members of committees
3. Recruit, select, and train advisors

- Work with clinicians and staff to identify potential advisors
- Review applications, conduct interviews if necessary
- Conduct orientation and training
- Provide mechanisms for onboarding and continued support
4. Prepare staff and clinicians for partnership

- Build partnerships – educate staff and clinicians
  - Who advisors are (and are not), what they do (and don’t do)
  - Benefits of working with advisors
  - Ideas for how they could work with advisors
- Recognize and address barriers
- Identify potential champions
5. Implement, coordinate, celebrate

- Create ongoing opportunities; don’t let advisors stagnate
- Track advisor involvement and accomplishments
- Share successes and lessons learned broadly— with advisors, leaders, clinicians, staff
Opportunities for working with patient and family advisors
Mechanisms

• Invite advisors to participate in one-time events
• Invite advisors to participate as team members on short-term projects
• Invite advisors to participate in an ongoing way on advisory councils
• Invite advisors to partner with leaders, staff, and clinicians on organizational committees
Patient and family advisory councils

• Formal group that meets regularly
• Members work together to help leadership and staff integrate and apply patient and family insights
• Membership: Majority patients and families, small number of hospital staff and clinicians
• What they are not:
  – Support groups, grievance committees, staff “show and tell” presentation forums
Getting started

• Invite patients or families to meetings, work groups, or trainings to share their experiences and stories

• Conduct a “walk-about” from the patient and family perspective
Gaining momentum

• Address parking and signage issues
• Review and provide input on patient education materials, other patient documents (e.g., Advance Care Directives, discharge documents)
• Review and provide input on policies (e.g., visitation)
• Provide input on specific initiatives (e.g., hand hygiene, fall prevention, patient portals)
• Provide input and help make decisions related to facility design
Full speed

• Advisors serve as members of committees
  – Infection control, patient safety, patient satisfaction, quality council
• Advisors help conduct root cause analyses
• Advisors participate in the interview process for new clinical or leadership positions
• Advisors help conduct staff orientation
• Advisors round on patients to obtain information about patient experiences
Look for ways to push your work further – example 1

• Good: At a surgical residents’ meeting, a surgeon reads anecdotes from family members whose children underwent surgical procedures about what went well and what could be improved

• Better: A surgeon asks family members to join the surgical residents’ noon conference to discuss what aspects of the process worked well and what could be improved
Look for ways to push your work further – example 2

• Good: A patient advisor is asked to provide input on a medication reconciliation initiative that will soon be implemented

• Better: Three patient and family advisors are invited to join a patient safety team that is beginning an initiative to improve medication reconciliation
Look for ways to push your work further – example 3

• Good: An administrator invites patients and families to comment on the final plans for a facility’s upcoming renovation

• Better: Patients and families are invited to fill several slots on a new committee that will oversee plans for a facility’s upcoming renovation
Questions and discussion

• What questions do you have?
• What experiences or lessons learned can you share?
Next steps:
Learning assignment
Webinar 2
Learning assignment: No prior work with advisors

• Identify one or two existing initiatives that would benefit from patient and family input, brainstorm ideas for involving patients and families.

OR

• Identify three to four opportunities to improve quality, safety, or experiences of care in your organization. If possible, ask a few patients or residents for input as well. Brainstorm ways in which patients and families could help.
Learning assignment: Some prior work with advisors

• Think about the ways in which your organization has worked with advisors. What has worked well? What has been challenging? (Get opinions from staff and advisors.) Brainstorm specific plans for building on successes and addressing at least one of the identified challenges.
Learning assignment: More prior work with advisors

- Think about the ways in which your organization has worked with advisors. What are the opportunities for pushing this work toward even greater partnership and shared leadership with patients and families? What do you need to do to take the next big leap?
Next time

• Webinar 2: Finding and training advisors
  – Discuss thinking that occurred after first webinar
  – Learn about:
    • Strategies and techniques for finding and selecting advisors
    • Characteristics of effective advisors
    • Training and orienting advisors
    • Strategies for successful initial interactions
    • Problem solving for challenging situations
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