

INSTITUTE FOR PATIENT- AND FAMILY-CENTERED CARE

www.ipfcc.org

Transforming Clinical Practice In Partnership with Patient and Family Advisors

From Philosophy to Action



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Objectives...

- Review Patient Engagement goals and metrics for Transforming Clinical Practice Initiative
- Identify strategies for clinical practice improvement through partnerships with patients and families
- Learn from Partnerships in Action in a Clinical Setting
- Discuss strategies for how to overcome barriers



Transforming Clinical Practice Goals

TCPI AIMs/Goals

- (1) Support more than 140,000 clinicians in their practice transformation work.
- (2) Build the evidence based on practice transformation so that effective solutions can be scaled.
- (3) Improve health outcomes for millions of Medicare, Medicaid and CHIP beneficiaries and other patients.
- (4) Reduce unnecessary hospitalizations for 5 million patients.
- (5) Sustain efficient care delivery by reducing unnecessary testing and procedures.
- (6) Generate \$1 to \$4 billion in savings to the federal government and commercial payers.
- (7) Transition 75% of practices completing the program to participate in Alternative Payment Models

Primary Drivers

Secondary Drivers

Patient and Family-Centered Care Design	1.1 Patient & family engagement 1.2 Team-based relationships 1.3 Population management 1.4 Practice as a community partner 1.5 Coordinated care delivery 1.6 Organized, evidence based care 1.7 Enhanced Access
Continuous, Data-Driven Quality Improvement	2.1 Engaged and committed leadership 2.2 Quality improvement strategy supporting a culture of quality and safety 2.3 Transparent measurement and monitoring 2.4 Optimal use of HIT
Sustainable Business Operations	3.1 Strategic use of practice revenue 3.2 Staff vitality and joy in work 3.3 Capability to analyze and document value 3.4 Efficiency of operation



Patient and Family-Centered Care Design

Respect values and preferences

Listen to patient and family voice

Collaborate with patients and families

Be aware of language and culture

Patient and Family-Centered Care

▼ Places emphasis on mutually beneficial partnerships between patients, families, and health care professionals. It acknowledges that families, however they are defined, are essential to patients' health and well-being, and are allies for quality and safety within the health care system.



Patient- and Family-Centered Core Concepts

- People are treated with respect and dignity.
- Health care providers communicate and share complete and unbiased information with patients and families in ways that are affirming and useful.
- Patients and families are encouraged and supported in participating in care and decision-making at the level they choose.
- ◆ Collaboration among patients, families, and providers occurs in policy and program development and professional education, as well as in the delivery of care.



Journey of Partnership

Just Starting
Out

Pieces in Place

Fully Partnering with Patients and Families

Change Concept Milestone

Practice can demonstrate that it encourages patients and families to collaborate in goal setting, decision making, and selfmanagement.

Change Concept Milestone

Practice has a formal approach to obtaining patient and family feedback and incorporating this into the QI system, as well as the strategic and operational decisions made by the practice.







Patient- and family-centered care is working "with" patients and families, rather than just doing "to" or "for" them.







Patient- and family-centered care provides the framework and strategies to **transform organizational culture** and improve the experience of care, and enhance quality, safety, and efficiency.



What is a Patient and Family Advisory Council?

- Formal mechanism to create and sustain partnerships with individuals and families who receive care at our organization who want to help us improve.
- Majority of members are patients and families who apply, are interviewed, selected, and prepared for the role.
- ◆ A forum where patients, families, and hospital staff work in partnership on important initiatives that impact patients, families, staff and clinicians.
- Clinician and staff involvement is essential.



Recruiting Patient and Family Advisors



Qualities and Skills of Successful Patient and Family Advisors

- Ability to share personal experiences in ways that others can learn from them.
- Ability to see the bigger picture.
- Ability to listen and hear other points of view.
- Ability to connect with people.
- Interest in improving health care for others.
- Sense of humor.
- Representative of those served by the organization.



Recruiting Patient and Family Advisors

- Ask staff and physicians.
- Ask patients/families at office or clinic visit when appropriate.
- Recruit at community health fairs.
- Contact support groups and community organizations (e.g., peer support classes, Healthy Living classes, Rotary, Kiwanis, and religious organizations).



Recruiting Patient and Family Advisors

- Post signs/brochures on bulletin boards in reception areas, exam rooms, and lobbies.
- Place notices in organization's publications, websites, and TV systems.
- Post information on Twitter and Facebook.
- Place announcements in local newspapers.



Patient & Family Advisors Needed!

I value your perspective and our partnership. I'd like you to consider becoming a Patient/ Family Advisor. Advisors volunteer to help us with program/policy review, review education materials and forms, provide input on quality and safety efforts as well as facilities planning. We are also using patient advisors to help design better processes of care.

Would you be interested in volunteering to be on a Patient Family Advisory Council? Please contact Sheila Miller at 687-6203 to get more information about this unique opportunity.

A Recruiting Tool



Sincerely,

Peace Health Medical Group Eugene, OR

Qualities of an Advisor:

- Shares insight and experience in productive ways
- Sees beyond his/her own personal experience
- Respects diversity and differing opinions
- Listens well
- Collaborates on solutions
- Has passion for enhancing the healthcare experience of all

Important Considerations:

- Current PeaceHealth Medical Group patient and/or family member
- Make commitment for 1 year at minimum
- Willingness to attend information session to learn more in mid-September
- Ability to attend monthly meetings on the fourth Thursday from 5:30 – 7:30 pm, starting in October



University of Michigan Cardiovascular Center









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Patient & Visitors Guide

Research | For Health Professionals

What to Expect

Parking & Transportation

Billing & Other Paperwork

Support and Support Groups

During Your Stay

Mardigian Wellness Resource Center

For Friends & Family

Patient & Family Centered Care Advisors

Giving Back to the Cardiovascular Center

Contact Information



Patient & Family Advisory Council Members

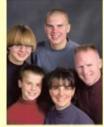
click on the links to learn more about our members



Tim Cusatis



Bonnie Davis Vice Chair



Michele Derheim, M.S.N., R.N.



Jonathan Eliason, M.D.

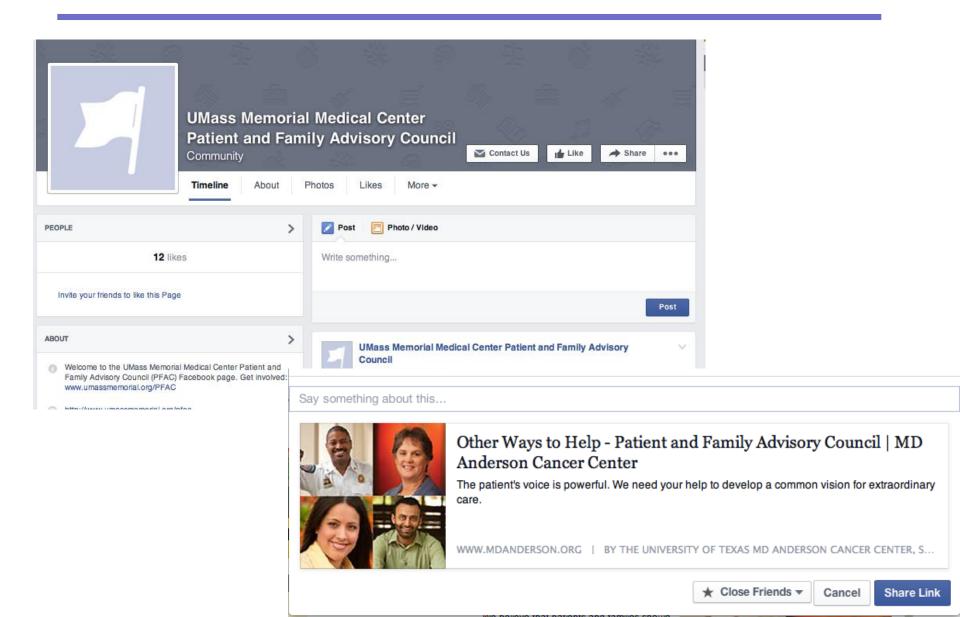


Trina Floyd



Dwight Lang

Facebook



Selecting Patient and Family Advisors



ESSENTIAL ALLIES Why would you like to serve as an advisor? PATIENT, RESIDENT, AND FAMILY ADVISORS A Guide for Staff Liaisons ■ PROVIDENCE Medical Group Please list times when you are able to attend meetings: (check all that apply) Evening: Weekend: PROVIDENCE MEDICAL GROUP Patient & Family Advisor Application I/We would be interested in helping with (identify all of your interest areas): Reviewing patient and family satisfaction tools. Developing/reviewing educational materials. Planning for the hospitalization (inpatient) care experience. Application Form for ☐ Planning the design of systems of care and facilities for the surgical experience. Planning for the clinic (outpatient or ambulatory) care experience. Patient and Family Advisors ☐ Planning the design of systems of care and facilities for the emergency care experience. Ensuring patient safety and the prevention of medical errors. Please print: Educating medical students and residents, new employees, and other staff about the experience of care and effective communication and support. Participating in facility design planning. What is the best way to contact you? (circle one) Improving the coordination of care and the transition to home and community care. Please check all that apply below: Long-term advisory council membership to have impact and influence on policies and practices ☐ I am a patient at a Providence Medical Group that affect the care and services patients receive. ______ State: ______ Zip Code: _____ →If yes, from which PMG clinic location(s) o ☐ Issues of special interest (please describe). ☐ I am the family member of a patient at a PM(Home Phone: (10 digits) Cellular Phone: (10 digits) ☐ I am a patient with a chronic health condition If you have served as an advisor, been an active volunteer committee member, or done public speaking for other programs or organizations, please briefly describe this experience: ☐ I am involved in the care of someone who ha Work Phone: (10 digits) Fax: (10 digits) ☐ I am a patient/family member receiving prev E-mail Address: SKILLS & INTERESTS If you wish to provide more in training, interests, hobbies or experiences you feel Language(s) You Speak: What are some specific things that health care professionals did or said that was most helpful Providence Medical Group to you and your family? Will you allow your contact information to be shared with other committee/advisory council members? What are some specific things that you or your family would like health care professionals to I am: A patient. A family member of a patient. do differently in order to be more helpful? Please put an 'X' in the Day(s) and Time(s) you are My care provided at was primarily: (check all that apply) Monday Tuesday Hospitalization (inpatient) Emergency Department care Do you know other individuals and/or families who have experienced care at ☐ Clinic visit (outpatient) Other programs, departments, or services who might be interested in serving as advisors? Please call them for us or list their name(s) and phone number(s) here: Afternoons Both inpatient and outpatient Evenings The dates of my active care experience at include: (check all that apply) 2002-2003 Please return this form to: 2006 to current year 2004-2005 2001 or before Your responses are important in planning your invo concerning the program or this application, please of Within the past two years, what care services have you or your family member used? (check all Please return your completed a that apply) AIDS AND HIV Gastroenterology/GI Genetics and/or Birth e nezme Autoimmune Pregnancy, Childbirth and Blood and Lymphatic Defects Intensive Care Unit (ICU) Rehabilitation Cancer Infectious Diseases Skin and Connective Tissues Cardiology ☐ Chest/Pulmonary Mental Health Surgery Ear, Nose and Throat Nephrology/Kidney Transplant Endocrinology/Diabetes Neurology Urology Eve Nutrition Other

Application Forms



Interview Questions

- 1. What are some specific things that health care professionals did or said that were most helpful to you and your family?
- 2. What are some specific things that you or your family would like health care professional to do differently in order to be more helpful?
- 3. If you had a magic wand and could change and improve health care for you and your family, what changes would you want to make?



Informing and Educating Staff



Informing and Educating Staff

What staff need to know:

- What is patient- and family-centered care?
- Leadership commitment to patient and family-centered care and meaningful patient and family engagement
- What does a Patient and Family Advisory Council do?
- What are the expected outcomes?
- How can they partner with the PFAC?

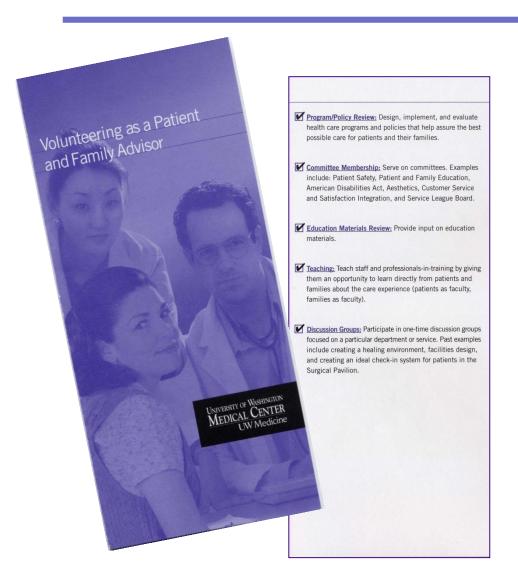


Why involve patients and families as advisors?

- Bring important perspectives.
- Teach how systems really work.
- Keep staff grounded in reality.
- Provide timely feedback and ideas.
- Inspire and energize staff.
- ◆ Lessen the burden on staff to fix the problems... staff do not have to have all the answers.
- Bring connections with the community.
- Offer an opportunity to "give back."



What will the PFAC do?



- Share input and feedback.
- Identify ideas for changes and improvements.
- Partner with staff to plan and implement changes.



Mental Barriers — Anticipate and Respond Proactively

- HIPAA will not permit this.
- Patients and families will hear negatives about our organization.
- We don't want to air our dirty laundry.
- ◆ This is nice to talk about, but we don't have time.
- Patients and families just don't understand our system.
- They will want things that cost too much and we'll have to tell them "no."
- We need to be better organized, before involving them.



How can staff partner with the PFAC?

- Attend a PFAC meeting.
- Bring an idea to the council for feedback and discussion.
- Ask the PFAC to participate on a short-term project.
- Ask the PFAC to review materials and provide feedback.
- Serve a term on the PFAC.



What will the PFAC do?

Share input and feedback.

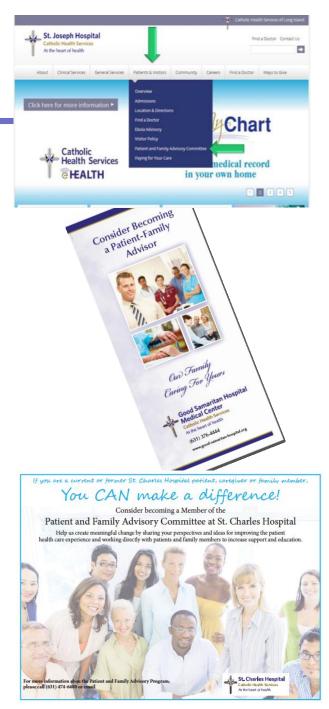
Review patient and family information materials or website pages.

Identify ideas for changes and improvements.

Choose priority area/s to focus on. Invite staff to explore possible ideas.

Partner with staff to plan and implement changes.

Participate in developing patient education programs.





Transforming Clinical Practice Initiative

VHQC's Patient & Family Advisory Council

September 28, 2016

VHQC

- a. Practice Transformation Network (PTN)
 Serving: Virginia, Maryland, Washington,
 D.C., West Virginia
- b. Quality Innovation Network Quality Improvement Organization for Maryland and Virginia



VHQC's Patient & Family Advisory Council

- a. Company-wide initiative
- b. Kicked-off in April 2016
- c. Includes Advisors from Maryland and Virginia
- d. Meets every other month with activities in between



Our Journey

- a. Obtained leadership support
- b. Created company-wide awareness of the Council and its purpose
- c. Developed a dedicated Planning
 Committee



- Draft Vision and Charter
- Create an Orientation Program
- Support with on-going planning



Recruitment and Onboarding

- a. Distributed recruitment brochure through various partners, providers and VHQC staff
- b. Screened each Advisor
- c. Conducted Orientation Session





Council Activities

- a. Attend Council meetings
- b. Input on Charter
- c. Assist with Advisor recruitment
- d. Feedback on materials
- e. Attend and present on webinars
- f. Participate in VHQC team meetings



Material Review Form

- a. Is the purpose of the document clear?
- b. Is the material written in a way that is easy to understand?
- c. Does this document motivate you to take a specific action to improve your health or the health of a family member?
- d. Are the graphics and/or pictures appropriate for the message?

Material Review Form Thank you for reviewing VHQC's materials. Your feedback helps us create materials that are easy for everyone to understand. Please complete and email this form to Amy Lenz at alenz@vhqc.org. Your name: Click here to enter text. Title of Document: Click here to enter text. 1. Is the purpose of document clear? Somewhat □ If you selected somewhat or no, please explain: Click here to enter text. 2. Do you feel this material is written in a way that is easy to understand? For example, there is no medical jargon or medical terms are explained. Somewhat If you selected somewhat or no, please explain: Click here to enter text. 3. Is this document persuasive? Does it motivate you to take specific action to improve your health or the health of a family member? Somewhat If you selected somewhat or no, please explain: Click here to enter text. 4. Are the graphics and/or pictures appropriate for the message? Yes Somewhat □ If you selected somewhat or no, please explain: Click here to enter text. 5. Please let us know if you have any other comments or questions.

Click here to enter text.



Advisor Recruitment Brochure

Patient & Family Council Seeks Volunteers Help support statewide healthcare improvement





Your insights as a patient, caregiver or advocate can help doctors, hospitals and nursing homes provide better care. We are looking for volunteers to serve as advisors on the VHQC Patient & Family Council. As an advisor, you will support statewide healthcare improvement initiatives that focus on:

- · Living well with diabetes or heart disease
- · Avoiding infections in hospitals, nursing homes and doctor's offices
- Helping doctors and nurses or other healthcare providers communicate healthcare information in a way that is easily understood by their patients
- Planning care after patients leave the hospital
- Improving healthcare in nursing homes

Advisors will be asked to participate in quarterly meetings held in Richmond. Our first meeting is scheduled for early 2016. As an advisor, you may be asked to review health education materials, participate in educational events, discuss your healthcare experiences, share your opinions with VHQC staff members regarding the best way to communicate with patients, and other important activities.

Serving as an advisor does not require a background in healthcare. To learn more, complete an interest form on the <u>VHQC website</u> (http://bit.ly/10i4eZZ) or contact Erica Morrison at <u>emorrison@vhqc.org</u> or 804.289.5320.

This material was prepared by VHQC, the Medicare Quality Innovation Network Quality Improvement Organization for Maryland and Virginia, under contract with the Casters for Medicare & Medicard Services (CMS), an againty of the U.S. Department of Health and Human Services. The contents presented do not necessarily reflect CMS policy, VHQC/13/20M1/208/2015/2016

Maryland & Virginia Quality Innovation Network

Patient & Family Council Seeks Volunteers

Volunteer today to improve the quality and safety of healthcare in your community





VHQC Patient & Family Advisory Council Vision

The VHQC Patient & Family Advisory Council will inform all quality improvement initiatives, ensuring a patient-centered approach to our work with healthcare providers and organizations in Maryland and Virginia. Advisors will collaborate with quality improvement teams, share their stories and actively participate in coalition meetings and learning events.

In partnership with patients, we will strive to transform our healthcare system, resulting in improved outcomes, clear communication and care that respects the dignity of our patients and the diversity of our communities.

We Want to Hear from you!

Your insights as a patient, caregiver or advocate can help doctors, hospitals and nursing homes provide better care. Volunteer today to serve as an Advisor on the VHQC Patient & Family Advisory Council. As an Advisor, you will support statewide healthcare improvement activities that focus on:

- · Living well with diabetes or heart disease
- · Avoiding infections in hospitals, nursing homes and doctor's offices
- Helping doctors and nurses or other healthcare providers communicate healthcare information in a way that is easily understood by their patients
- Planning care after patients leave the hospital
- Making healthcare equal for everyone
- Preventing diseases by immunizing

What would I do as an Advisor?

Advisors attend meetings every other month either in-person or by webinar. As an advisor, you may be asked to review health education materials, participate in educational events, discuss your healthcare experiences, share your ideas regarding the best way to communicate with patients, and participate in other important activities.

Next Steps

Serving as an advisor does not require a background in healthcare. To learn more, complete an interest form on the <u>VHQC website</u> (http://bit.ly/10i4eZZ), contact Amy Lenz at <u>alenz@vhqc.org</u>, or call VHQC in Maryland at 301.744.8472 or Virginia at 804.289.5320.

Questions? Turn page over for Frequently Asked Questions

Patient and Family Advisory Council Frequently Asked Questions





What is the Patient & Family Advisory Council?

The Council is a group of patients, caregivers and advocates working together to share their ideas and experiences to help us improve the quality and safety of healthcare.

Am I a good candidate for the Patient & Family Advisory Council?

If you have Medicare, or are a family member or caregiver for someone that has Medicare, and you have experience with the healthcare system, then you are a perfect candidate to become an advisor.

What do Advisors do?

Advisors share their perspective and stories about health and medical care experiences to represent all patients. Advisors provide their thoughts, feedback and opinions on what are the most important areas to improve and how to engage healthcare providers and patients in these improvements. The role of an advisor includes a partner, educator, speaker, listener, advocate and leader. They help make sure the focus of healthcare stays on the patient.

What is the commitment of an Advisor?

Advisors will be asked to attend meetings every other month either in-person or by webinar. Advisors can expect to spend approximately 2-4 hours a month on Advisory-related activities.

How will Advisors know what to do?

VHQC will provide coaching to the council members so they are supported in their advisory role.

How do I learn more?

Please complete an interest form on the <u>VHQC website</u> (http://bit.ly/10i4eZZ), contact Amy Lenz at <u>alenz@vhqc.org</u>, or call VHQC in Maryland at 301.744.8472 or Virginia at 804.289.5320.

Blue Bag Initiative

Blue Bag Check Up Participant Evaluation

Thank you for participating in today's Blue Bag Check Up. Your opinion is important to us. Please, take a minute to fill out the evaluation. This will help us improve other events like this in the future and help us learn if today's program was helpful to you.

1	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
	<u>:</u>	<u>:</u>	<u>:</u>	(0)	
Was the Blue Bag Check Up helpful to you?					
Was the information clear?					
. Did you learn anything from today's session?					
 Will you change the way you take your medications from today's check-up? 					
When you completed the Bi Bag Check Up, did you clea understand the purpose fo taking all of your medication	r				

"Bring It With You" Blue Bag Check List

Pharmacist: Phone:

1. You identified:

- ✓ Your medications
- ✓ Why you need to take them
- ✓ How to take them

2. The Pharmacist discussed:

- ✓ Importance of taking the medications correctly
- ✓ Not sharing your medications with others
 ✓ Monitoring the effects of your medication and
- potential side effects

 ✓ All expired medications you should NOT be
- taking were separated into another bag

3. Before you leave:

- ✓ Ask plenty of questions
- ✓ Understand what you were told
- ✓ Repeat the information back to the pharmacist

4. Next Steps:

- ✓ Take the evaluation for follow-up with your doctor or primary care provider
- Return periodically so that your medication can be reviewed again

For more information, visit vhqc.org



Always Keep your medications/lists in your blue bag and take it to EVERY appointment. This will make it easier for the...

- Doctor or primary care physician to review and update your medical record
- Pharmacy/Pharmacist to check medications in your profile for duplications, side effects or drug interactions
- Hospital
 to document your medication list accurately

For more information, visit vhqc.org







Key Insights

- a. It takes time and dedication but well worth every moment!
- b. Create awareness of the Council and its purpose
- c. Allocate resources
- d. Be flexible and recognize you don't need to have all the answers
- e. Recruit the right Advisors



What a PFAC Is NOT...



A support group!



A grievance session!



Assessing Effectiveness – PFAC Meetings

Informal -

- Agenda was appropriate
- Stayed on agenda
- Everyone participated
- Members felt listened to
- Council got things done





Assessing Effectiveness – PFAC Meetings

More Formal –

- Meeting evaluation form (when appropriate)
- Evaluation of presentation to the council (each time)
- Advisor self-assessment of participation (yearly)
- Advisor reflection of PFAC experience (yearly)





Tracking Progress – PFAC Accomplishments

Consider tracking:

- Number of advisors and number of staff on PFAC
- Number of meetings, hours served (including efforts beyond council meetings)
- Number of staff and/or departments that partnered with PFAC
- Issues identified by patient and family PFAC members – how addressed
- Projects completed with results/accomplishments
- Community involvement





Keys to Success

- Leadership
- Modest Resources Parking Vouchers, A Lovely Meal
- Start Small but... Begin
- Communicate Plan
- Model Partnership in Meetings
- Create Momentum
 - Aim for a combination of low-hanging fruit and more complex projects
- Share Progress
- Celebrate Successes!



Q&A



Office Hours/Discussion

