Kansas PFAC Collaborative
Cohort 4
Virtual Learning Event
OCTOBER 22, 2018 • 1:00 TO 2:30 P.M. CT

Agenda

Part 1:
• Site visits summary
• Operationalizing your PFA Program
• Discussion: Encouraging PFAs to assume responsibility for running the PFAC
• Hospital Sharing
  ◦ Spotlight on Greenwood County Hospital
  ◦ Spotlight on Anderson County Hospital
• Discussion: PFA role in building/maintaining community relationships
• Q & A with Allison and Tiffany

Part 2: HIIN Extension
Continuing PFA/PFAC Collaborative Cohort 4 through March 2019

Opportunities to continue:
Track 1: Back to Basics
Track 2: Mini-fellowship

Next steps and resources
Q&A
Kansas PFAC/PFA Collaborative
Cohort 4

Kansas PFAC/PFA Collaborative Faculty

Tiffany Christensen
Vice President for Experience Innovation
The Beryl Institute

Allison Chrestensen
Principal Patient and Family Engagement Consultant
Tandem Healthcare Solutions

Spotlight
- Melissa Jones from Greenwood County Hospital
- Josh Ford from Anderson County Hospital

Operationalizing your PFA Program: 7 Steps to Sustainability
Kansas PFA/PFAC Collaborative Cohort 4 Extension
Virtual Learning Session

October 22, 2018

7 Steps to Sustainability

Step 1: PFCC and PFAs
• Raising Awareness of the “why”

Step 2: Preparing
• Key decisions regarding approach & logistics

Step 3: Structure
• Leadership buy-in & planning

Step 4: Recruiting
• PFA selection

Step 5: Training
• Comprehensive training for PFAs & staff

Step 6: Launching and running
• Outlining agenda, meeting facilitation

Step 7: Sustaining
• In it for the long haul!

PFA Program Models

PFAs working more independently (i.e., on committees)
• Faster launch
• More direct mentoring needed
• Frontline engagement

PFACs: staff request feedback from PFAs
• Slower launch
• Lower risk
• High-level engagement

Focus Groups
• Easier buy-in for resistant leaders
• May lead to formation of PFAC
• Detailed feedback re: 1 specific item

Kansas Healthcare Collaborative
# PFA Programs & PFE Criteria

1. Pre-admission/planning checklist
   - PFAC
   - Focus Group
   - PFA Reps on Committees
2. Shift-change huddles & bedside shift report
   - PFA Participation in staff training
3. Dedicated person or functional area for PFE
   - PFAs on interview panels
4. PFAC/patients on QI committees
   - PFA Reps on Committees
5. Patients on governing/leadership boards
   - PFA Reps on Hospital Board and other internal committees

# PFAC Collaborative Site Visits:
July/August 2018

- Hiawatha Community Hospital
- Anderson County Hospital
- Holton Community Hospital
- Ransom Memorial Hospital
- Greenwood County Hospital
- Sumner County Hospital District No. 1
- Kingman Community Hospital
**Track 1 Hospitals: Common Themes**

Building a sense of co-ownership
- Giving PFAs time to become comfortable while also ensuring they begin to take ownership of the work
- Recognizing the busy professionals who support PFA work need PFA partners to sustain the effort

**Key Strategies:**
- Utilize KHC HIIN Online Toolkit
- Set expectations: Include Delegation of Duties in PFA “job description”
- Collaborate with Kansas HIIN colleagues via Listserv

**Encouraging PFAs to assume responsibility for running the PFAC**

- Appointing a patient/family co-chair
- Recruiting & mentoring new members
PFAC Delegation of Duties

<table>
<thead>
<tr>
<th>STAFF</th>
<th>VOLENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volunteer Coordinator</td>
<td>New Applicant Greeter</td>
</tr>
<tr>
<td>• Send PFAC application to interested applicants</td>
<td>• Initiate contact with potential PFAC applicants</td>
</tr>
<tr>
<td>• Collect and file completed applications</td>
<td>• Use guide to explain PFAC Program and process for becoming a patient/family advisor</td>
</tr>
<tr>
<td>• Request background checks from Volunteer Services office</td>
<td>• Forward names of interested applicants to PFAC Coordinator</td>
</tr>
<tr>
<td>• Maintain volunteer files for all volunteer patient/family advisors</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>INTERVIEWS SCHEDULER</th>
<th>MEETING MINUTES MASTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Schedule 30-minute interviews for new PFAC advisor applicants with:</td>
<td>• Record PFAC meeting minutes using Meeting Minutes Template</td>
</tr>
<tr>
<td>○ At least one member of PFAC executive team</td>
<td>• Send meeting minutes to PFAC Coordinator and Meeting Organizer</td>
</tr>
<tr>
<td>○ One staff advisor</td>
<td></td>
</tr>
<tr>
<td>○ Co-chair from this PFAC or another PFAC</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MEETING ORGANIZER</th>
<th>MEETING COMMUNICATOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Secure &amp; confirm speakers/presenters for PFAC meeting</td>
<td>• Solicit PFAC Executive Team members for topics/presenters for upcoming PFAC meeting</td>
</tr>
<tr>
<td>• Complete agenda template</td>
<td>• Forward topics and presenters to Meeting Organizer</td>
</tr>
<tr>
<td>• Send completed agenda to Meeting Communicator for distribution 1 week prior to PFAC meeting</td>
<td>• Send completed PFAC meeting agenda (once received from Meeting Organizer) &amp; meeting minutes to all PFAC members</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TRACKER</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Update Issue Tracker following each PFAC meeting</td>
<td></td>
</tr>
<tr>
<td>• Share current version of Issue Tracker during PFAC meetings</td>
<td></td>
</tr>
<tr>
<td>• Save updated version of Issue Tracker on PFAC SharePoint site</td>
<td></td>
</tr>
</tbody>
</table>

Track 1 Hospitals: Common Themes

Continual and creative education for PFAs
- After initial orientation, ensure PFAs have the education needed to grow in the role
- If the hospital point person needs support, find resources for them to build confidence, too!

**Key Strategies:**
- Utilize KHC HIIN Online Toolkit
- Explore additional online/written materials to support continued education
- Collaborate with Kansas HIIN colleagues via Listserv
Track 1 Hospitals: Common Themes

Engaging PFAs as community liaisons
- Helping the community understand the value of local hospital services
- Supporting fundraising and legislative issues

Key Strategies:
Create key talking points for community education
Cultivate community speakers
Involve PFAs in public events in order to demonstrate partnership in action

Hospital Sharing:
Greenwood County
PFAC started in September 2016 with 4 council members

- **Accomplishments/Activities:**
  - Developed patient information book
  - Updated telephone scripting
  - Signage review, updated clinic signage
  - Fundraising
  - HCAHPS review

- **Future Goals**
  - Recruitment of advisors (goal of 7 advisor council)
  - Update council operations/advisor roles
  - Patient rounding

---

**Track 2 Hospitals:**

**Common Themes**

1. **Maintaining PFA engagement**
   - Encouraging consistent attendance at PFAC meetings
   - Taking on new projects

**Key Strategies:**
- Invite staff & leaders to PFAC meetings
- Advocate for PFA involvement in new & existing hospital initiatives
- Reevaluate PFA Program model
Track 2 Hospitals: Common Themes

2. Engaging PFAs in quality efforts
   - “Secret shopper” projects for hand hygiene, fire drills
   - Hospital emergency drills
   - Community needs assessment task force

   **Key Strategies:**
   - Regularly incorporate brainstorming sessions into PFAC meetings (include staff)
   - Look for opportunities to break out of silos/integrate efforts
   - Reevaluate PFA Program model

Track 2 Hospitals: Common Themes

3. Maintaining the PFAC through organizational change and shifting priorities:
   - Leadership and staffing changes
   - EMR implementation

   **Key Strategies:**
   - Transparency
   - Reevaluate PFA Program model
   - Outline a transition plan
   - Utilize KHC PFA Toolkit
Hospital Sharing: Anderson County

Anderson County Hospital

- ACH is a critical access hospital, a part of the Saint Luke's Health System.
- Approximately 7,800 residents, located in southeast rural Kansas, approximately 215 employees.
- PFAC started as a committee in 2016 with an initial 3 to 4 hospital staff members.
- Recruitment emphasis on community members. We currently have 9 members – 6 of which are members of the community, and 1 is a hospital board member.
- A PFAC representative was recently elected to sit on ACH’s Quality Assurance Performance Improvement Team.
- Over the last 2 years, PFAC meetings have included education opportunities to orient members not only to PFAC but also to our hospital.
Anderson County Hospital

- A highlighted success has been our PFAC’s cooperation in our county’s Community Needs Assessment (administered through Saint Luke’s Health System). This was an opportunity for our PFAC group to provide meaningful feedback and direction for future growth and changes county wide.
- General process improvement is a regular part of each PFAC meeting. Each member has the opportunity to share their perspective on current issues, as well as the ability to present new issues. This has provided for near real-time problem identification and resolution.
- Looking forward, of course, we want to continue to grow our committee membership and involvement.
- Additionally, our PFAC is working with nursing staff throughout the hospital to review discharge and education processes. We are going to have nurses go through a typical discharge with our PFAC committee. Our PFAC committee will be a valuable, unbiased and safe resource to help nurses understand discharge from a patient’s perspective.

PFA role in building/maintaining community relationships
PFA role in building/maintaining community relationships

• Education
  – Learn about community member concerns
  – Educate about hospital initiatives
  – Address rumors/misinformation

• Patient experience information
  – Are there stories circulating that aren’t coming through on surveys?

• Volunteer recruitment
  – PFAs and other roles
Allison Chrestensen
Principal Consultant
Tandem Healthcare Solutions
allison@tandemhcs.com

Tiffany Christensen
Vice President, Experience Innovation
The Beryl Institute
tiffany@theberylinstitute.org

Health Research & Educational Trust
HIIN Extension!

Through March 27, 2019 (with an optional additional year through March 2020)
Yes! **Cohort 4 is Continuing!**
Through March 2019

New focus in tracks during the 6-month extension:

**Track 1: Back-to-Basics or “Reboot”**
For staff leaders needing back-to-basics instruction for working with patient and family advisors

**Track 2: Mini-fellowship**
For hospital teams already working with PFAs

---

**Track 1: Back-to-Basics or “Reboot”**
For staff leaders new to working with PFAs

- Participate in an instructional video series to learn about working with patient and family advisors and setting up PFACs.
- Develop an action plan.
- Join Back-to-Basics webinar on Nov. 12 (1:00 to 2:30 pm), then individual coaching calls.
- Option: Join monthly Track 2 webinars for continued learning with peers.
### Kansas Healthcare Collaborative

#### Kansas Healthcare Collaborative

#### Kansas Healthcare Collaborative

#### Kansas Healthcare Collaborative

#### Kansas Healthcare Collaborative

#### Kansas Healthcare Collaborative
Track 2: Mini-Fellowship
For hospital teams already working with PFAs

• Identify one of five CMS PFE metrics your hospital wants to implement or improve.
• Develop an action plan. (Collaborating with PFAs when possible).
• Sign up for individualized coaching calls.
• Join monthly webinars to share progress with your peers and to stay on track.

Preliminary Schedule

• **Oct. 22** – Virtual Session (1 to 2 pm CT)
  Intro to Collaborative extension, next-step assignments

• **Nov. 12** – “Back to Basics” Session for Track 1
  1 to 2:30 pm CT  [REGISTER HERE]

• **Dec. 4** – Virtual Session (1 to 2 pm CT)
• **Jan. 8** – Virtual Session (1 to 2 pm CT)
• **Feb. 5** – Virtual Session (1 to 2 pm CT)
• **March 5** – Virtual Session (1 to 2 pm CT)
ACTION PLANNING!

Resources

• Action Plan
• Coaching Calls with Faculty
• Online Instructional Videos
• Virtual learning/sharing sessions
• Kansas PFAC List-serv
• PFA/PFAC Collaborative Living Toolkit
• Private KHC HIIN Web Page
KHC PFAC Collaborative Living Toolkit!

- Recruitment flyer example
- Sample PFAC meeting agenda
- Meeting minutes template
- Delegation of Duties outline
- Sample New Applicant Greeter script

KHC PFAC Collaborative Online Toolkit:
https://khconline.sharefile.com/f/foa0eff0-0884-4ccc-a3b4-1f7093d93ee5

Note: If this link does not work for you, we may need to grant you access (using your hospital email address). If so, please email Chuck Duffield (cduffield@khconline.org) to request.

PFA/PFAC Collaborative Living Toolkit
EXAMPLES – RESOURCES YOU CAN USE

- Step 5 - Training and Orienting PFAs
- Step 6 - Launching and Running
- Step 7 - Sustainability

KHC HIIN PFA/PFAC Collaborative
PFA/PFAC Collaborative Living Toolkit
EXAMPLES - RESOURCES YOU CAN USE

STEP 1: Raising Awareness of the “Why”
Benefits of PFACs
AHRQ Guide: How PFE Benefits Your Hospital

STEP 2: Preparing: Leadership Buy-In and Planning
Framework for Patient and Family Involvement in Quality Improvement (IPFCC)
HRET HIIN Fellowship Orientation Planning Guide

STEP 3: Structure:
Key Decisions About PFAC/PFA Engagement Approach
PFAC Planning Guide
Tips for Involving Patients and Families on Committees

STEP 4: Recruiting
Declining a candidate sample letter
Interview guidelines
New Applicant Greeter script
PFA Job Description
PFAC Application

STEP 5: Training & Orienting PFAs
Suggested Orientation Topics
Advocate Children’s Hospital: Family Liaison Coordinator job description
Focusing on Staff Communication: Video
Focusing on Staff Communication: Handout

STEP 6: Launching & Running
Meeting minutes template
Sample PFAC agenda
Sample By-Laws (Dana Farber)

STEP 7: Sustainability
2016 PFE Awards Application
Issues tracker sample
PFA Satisfaction survey sample
Delegation of Duties example
Journal article: PFACs: Where’s the Money
Sample PFAC annual reports
PFA/PFAC Collaborative Toolkit
INSTRUCTIONAL VIDEOS
Also organized around the 7 steps

Moving to KHC website!
New password-protected link to video page will be provided by Nov. 12 Track 1 webinar

Gaining Access to the PFAC Members Website from khconline.org

Click on PFE/Patient & Family Engagement

PFAC Members Section
- Click here to access the Patient and Family Advisory Council (PFAC) member page

Link is located in the under the PFAC Members Section.
More Tools at your Fingertips

- **Kansas PFAC Listserv**
  To send a message to your Cohort 4 peers and faculty, address your email to: [KHC-PFAC@LIST.KHCONLINE.ORG](mailto:KHC-PFAC@LIST.KHCONLINE.ORG)
  
  *Note: The email address is case-sensitive.*

- **Coaching Calls with PFAC Faculty**
  Use this link to schedule your team’s 15-minute coaching call:
  [http://www.signupgenius.com/go/30e0849a8a72ba5fe3-kansas2](http://www.signupgenius.com/go/30e0849a8a72ba5fe3-kansas2)

### Full Schedule

**INDIVIDUALIZED COACHING CALLS**

- **with Tiffany or Allison**
  
  *Typically 15 minutes each*
  
  **1st Mondays:** 8:30 – 10:30 a.m.
  **3rd Thursdays:** 1:00 – 3:00 p.m.

- November 12 and 14, 2018
- December 10 and 20, 2018
- January 14 and 17, 2019
- February 11 and 21, 2019
- March 11 and 21, 2019
INDIVIDUALIZED COACHING CALLS

Sign Up Is Now Open for:
November 12 and 14*, 2018
December 10 and 20, 2018

http://www.signupgenius.com/go/30e0849a8a72ba5fe3-kansas2

*Nov. 14 is offered earlier this month due to Thanksgiving holiday.

Patient and Family Engagement Resources

• Partnership for Patients Healthcare Communities website
  https://www.healthcarecommunities.org/ResourceCenter/PartnershipforPatientsLibrary?CategoryId=836642&EntryId=111951

• HRET HIIN website
  http://www.hret-hiin.org/topics/patient-family-engagement.shtml

• KHC website
Next Steps

ALL:
- Consider which track is best for you and sign up today!
  [https://www.surveymonkey.com/r/KHC-HIIN-PFAC-C4-Ext-Signup](https://www.surveymonkey.com/r/KHC-HIIN-PFAC-C4-Ext-Signup)

Track 1:
- Sign up for Nov. 12 webinar [REGISTER HERE](#)
- Sign up for coaching call
- Submit action plan by Nov. 21.

Track 2:
- Sign up for Dec. 14 webinar
  (Link will be sent via PFAC list-serv)
- Develop action plan with your team
- Submit action plan by Nov. 21.

Allison Chrestensen
Principal Consultant
Tandem Healthcare Solutions
allison@tandemhcs.com

Tiffany Christensen
Vice President, Experience Innovation
The Beryl Institute
tiffany@theberylinstitute.org
Questions?