



The influential voice of Nebraska's hospitals

Module I

Patient and Family Engagement

Learning Objectives

- State key principles of the principle of excellence: creating value for the customer.
- Identify strategies for engaging patient and care partners into all levels of a system.

Creating Value for the Customer

Operational Excellence

A mindset that embraces certain principles and tools to create sustainable improvement within an organization.

Source: <https://tallyfy.com/guides/operational-excellence/>

Operational Excellence: 10 Core Principles

1. Respect Every Individual
2. Lead with Humility
3. Seek Perfection
4. Embrace Scientific Thinking
5. Focus on the Process
6. Assure Quality at the Source
7. Flow and Pull Value
8. Think Systematically
9. Create Constancy of Purpose
- 10. Create Value for the Customer**

Value Equation

$$\text{Value} = \frac{\text{Quality}}{\text{Cost}}$$

Value can be increased by increasing quality while maintaining cost or by reducing cost while maintaining quality.

Value Equation

$$\begin{array}{c} \text{V} \\ \text{(VALUE)} \end{array} = \frac{\begin{array}{c} \text{Q} \\ \text{(QUALITY)} \end{array} + \begin{array}{c} \text{S} \\ \text{(SERVICE)} \end{array}}{\begin{array}{c} \$ \\ \text{(COST)} \end{array}}$$

Value “Attributes”

- Accessibility: “can I get what I need or want from you?”
- Service: “is dealing with you a pleasant experience?”
- Effectiveness: “is what you’re providing going to satisfy my need or want?”
- Costs: “what’s the cost to me and my family and is it worth it?”

Customer Value Requirements

- Understanding the customer's needs and expectations
- Responding to customer feedback
- Looking for ways to remove waste and add value to processes



Identifying Value Drivers

- Anything that is added to a service that will increase its value to consumers
- Help boost its leverage on the marketplace
- What differentiates a service from those of a competitor

Voice of the Customer

Examples: Customer Voice

How does your facility ensure that the customer, i.e., your patients, have a voice in expressing their view(s) of what comprises value?

Strategies for Patient/Family Engagement

Four primary strategies for promoting patient/family engagement:

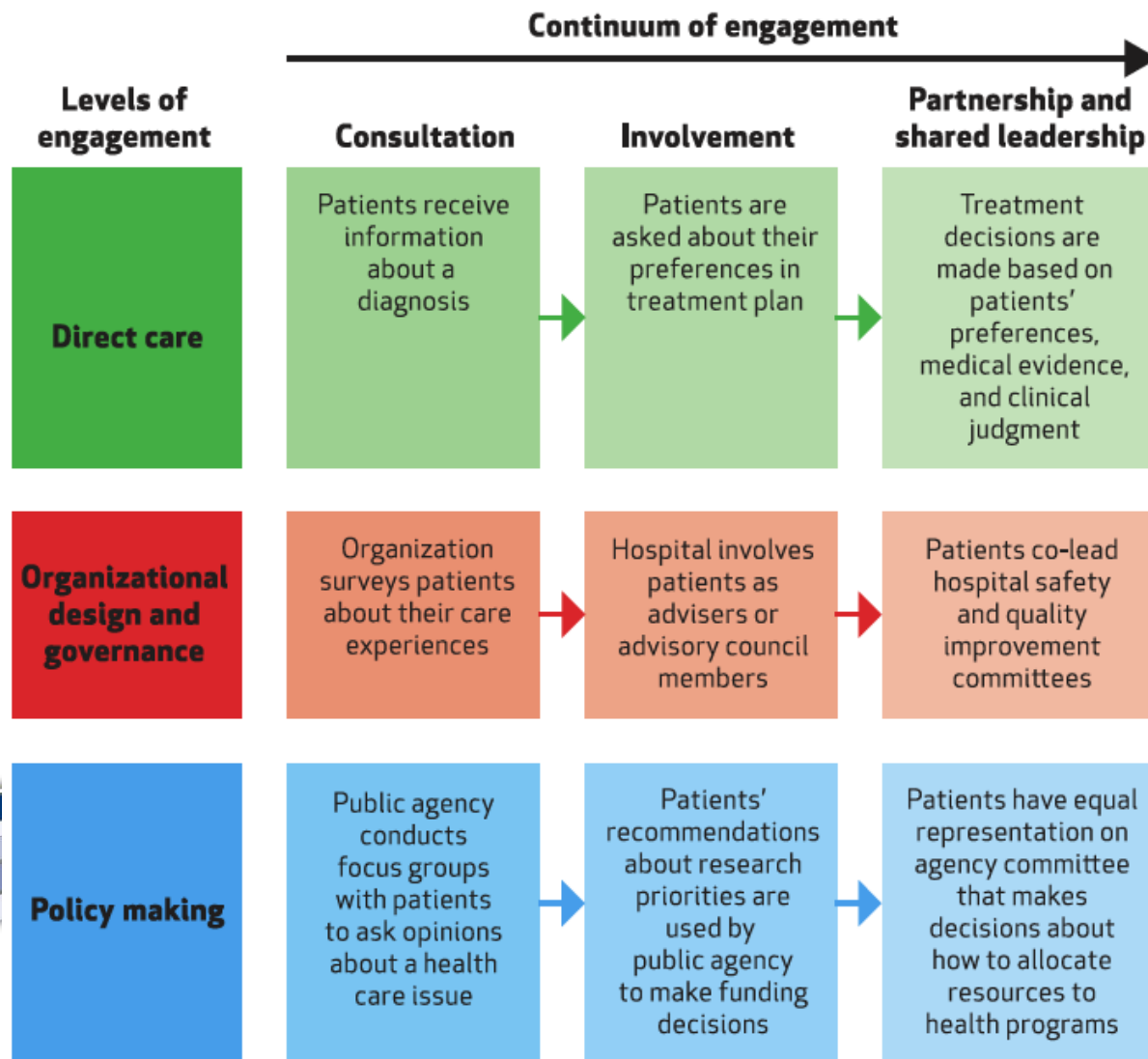
- Encourage patients and family to participate as advisors
- Promote better communication
- Implement safe continuity of care
- Engage patients and family in discharge planning

Patient/Family Engagement Definition

*Patients, families, their representatives, and health professionals working in **active partnership** at various levels across the health care system – direct care, organizational design and governance, and policy making – to improve **health and health care**.*

Source: *Health Affairs* 32 No. 2 (2013) (223-231)

Multidimensional Framework



Direct Care Level

May involve the following:

- Interaction with clinicians
- Resources and groups to sustain personal health practices

Organizational Design & Governance Level

May involve the following:

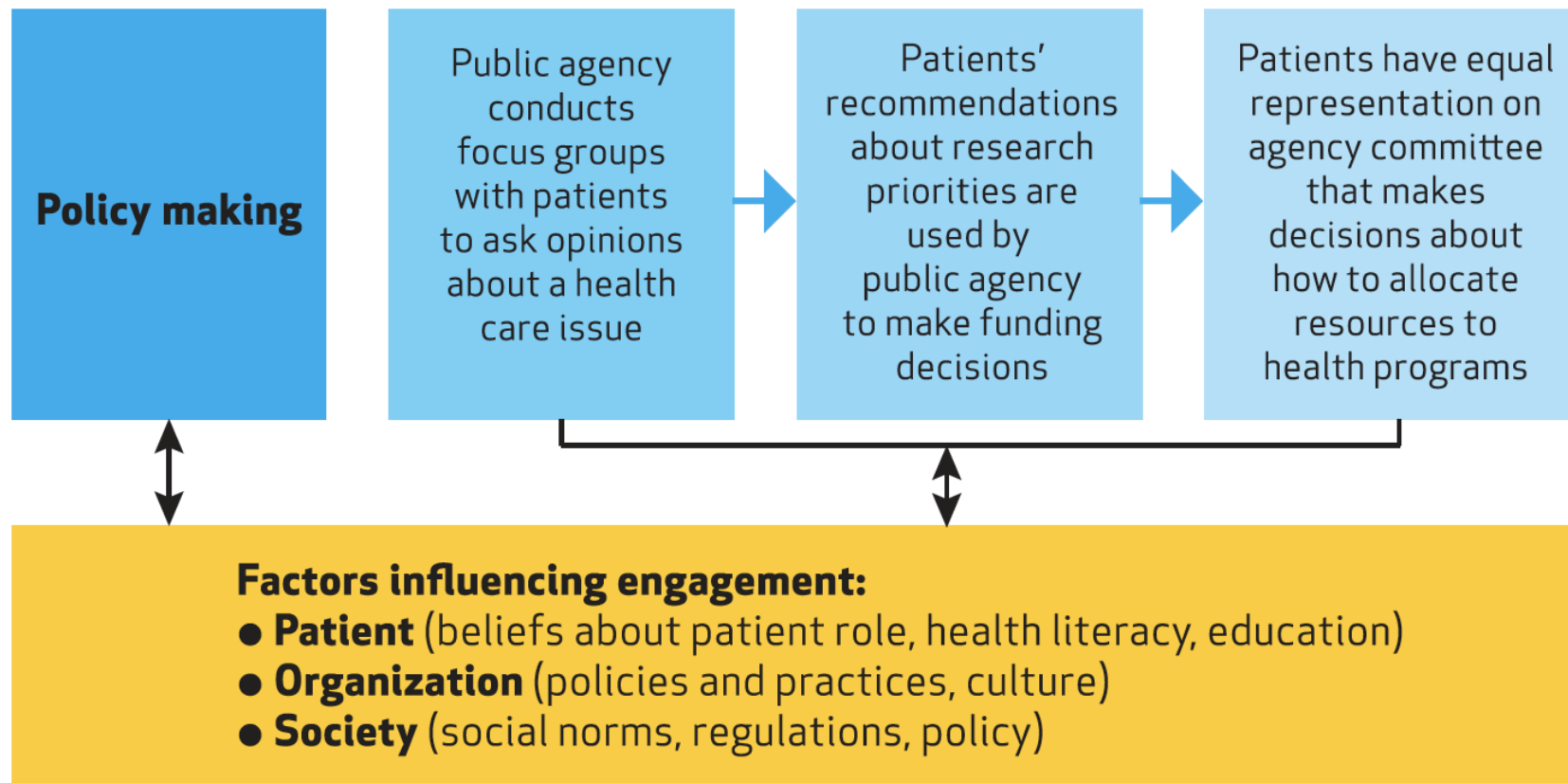
- Partnering to plan, deliver, and evaluate care
- Help design health care facilities
- Serve on patient and family advisory councils
- Help design and execute quality improvement projects
- Assist with staff hiring, training, and development

Policy Making Level

May involve the following:

- Collaboration with community leaders and policy makers
- Participation in health and clinical research
- Speaking on behalf of a general constituency

Multidimensional Framework



Tools & Strategies

- Patient and Family Advisors
- Communicating to Improve
- Nurse Bedside Shift Report
- Care Transitions from Hospital to Home: IDEAL Discharge Planning

Patient & Family Advisors

Provide feedback on:

- Experience(s)
- How care is delivered
- Materials
- Facility design

Patient & Family Advisors

Avenues for advisor involvement:

- Short-term projects
- Advisory Council members
- Hospital Quality and Safety Committee(s)

Communicating to Improve

Help patients and families understand:

- Various opportunities that exist for engagement
- How to be a partner in their care
- Roles of different members of the health care team

Bedside Shift Report

Goal: Ensure a safe handoff of care

Explain:

- Benefit(s) of involving patient and family
- Process
- What to expect

IDEAL Discharge Planning

- Include patient and family as partners
- Discuss areas to prevent problems at home
- Educate the patient and family
- Assess patient and family knowledge and understanding
- Listen and honor patient and family wishes

PFE Measures Toolbox

Existing measures address:

- Education and involvement
- Motivation and self-efficacy
- Behavior change and activation

PFE Measures Toolbox

Future considerations may include:

- Data sources and burden
- Cultural and linguistic appropriateness
- Inclusion of family

Measures of PFE

CAHPS Patient satisfaction

- Assesses patient-provider communication, patient education, the discharge process and elements of hospital environment
- Retrospective or real-time

Social media

- Yelp, Google
- Twitter, Facebook

Measures of PFE

Patient Activation Measure (PAM)

- Role in activation
- Confidence and knowledge
- Proactively taking action
- Staying the course
- Ability to self-manage problems, collaborate with providers, and navigate healthcare system

Measures of PFE

Patient-reported outcomes measures (PROMs)

- Impact a procedure had on lifestyle
- Comes directly from the patient
- Quality of life

Concept to Reality

Hear how a robust Patient Family Advisory Counsel got started at Franciscan Healthcare in West Point.

Franciscan Healthcare's PFAC Journey

- Officially started in 2014
 - Led by Sister Joy Rose
 - Struggled obtaining support from CEO
 - Provided education to Board and Medical Staff
 - Obtained our first committee members by asking members of the Medical Staff and Administration for recommendations

Journey continued

- First meeting was to educate why they were there and what is expected of them
- Followed by a “Walk Around” of the facility
 - Asked “what we did well?” and “what we did not so well?”
 - Feedback was noted and reviewed with the CEO.
 - CEO addressed concerns at the following meeting.

Journey continued

- First couple of meetings served as an informal interview of the potential PFAC members.
 - Evaluated based on constructive feedback given
 - Determined which members would be most valuable on specific organizational committees.
 - i.e., Mission, Fall prevention, QPI, Safety, Disaster

Struggles

- Obtaining a diverse committee of various generations and backgrounds
- Finding members of the Hispanic community that would participate
- Finding a time that would work for most on a somewhat regular basis

Breakthrough

- Due to the addition of a couple of new Hispanic employees, we were able to convince a group of Hispanic patients they knew to meet with us
 - March of 2019
 - Continue to meet quarterly
 - Never the same group

Hispanic PFAC

- Different focus
 - Meetings usually more focused on education
 - Use of Antibiotics
 - Billing statements and collection policies
 - COVID vaccination information
 - Administered vaccine to those present who wanted one
 - Have encouraged more of them to apply for open positions across our organization

Hispanic PFAC

- Facilitated English as a second language class through Northeast Community College
- Worked with the Chamber office to find ways to help with integration
- Send social media posts in Spanish as well as in English

And now with Covid...

- Some members of the PFAC refused to be vaccinated.
- Lack of resources due to being pulled in other directions.
- Will start again once hospital restrictions are removed.

Resources

Additional resources

- AHRQ Strategies
 - Guide to Patient and Family Engagement in Hospital Quality and Safety
- Rural Hospital PFE 2021 Toolkit
- Project Patient Care

Report Out