

KHC HOSPITAL IMPROVEMENT INNOVATION NETWORK

# Kansas PFAC Collaborative Cohort 4 Virtual Learning Event

OCTOBER 22, 2018 • 1:00 TO 2:30 P.M. CT




623 SW 10<sup>th</sup> Ave. • Topeka, KS 66612 • (785) 235-0763 • [www.khconline.org](http://www.khconline.org)



Kansas Healthcare Collaborative

KHC HIIN PFA/PFAC Collaborative

## 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

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**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

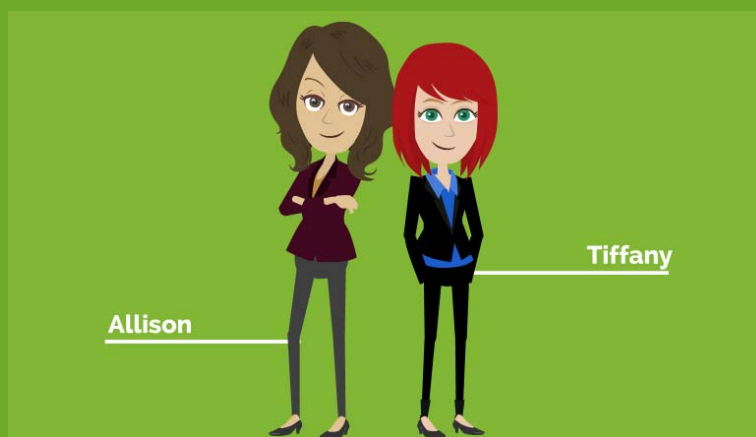
- Melissa Jones from Greenwood County Hospital
- Josh Ford from Anderson County Hospital

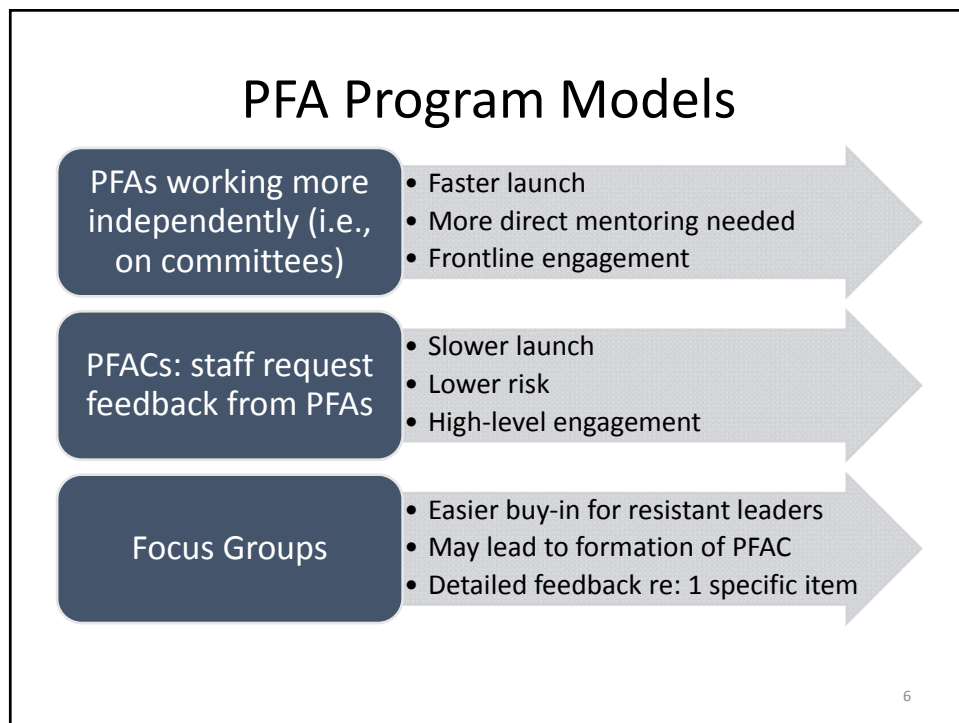
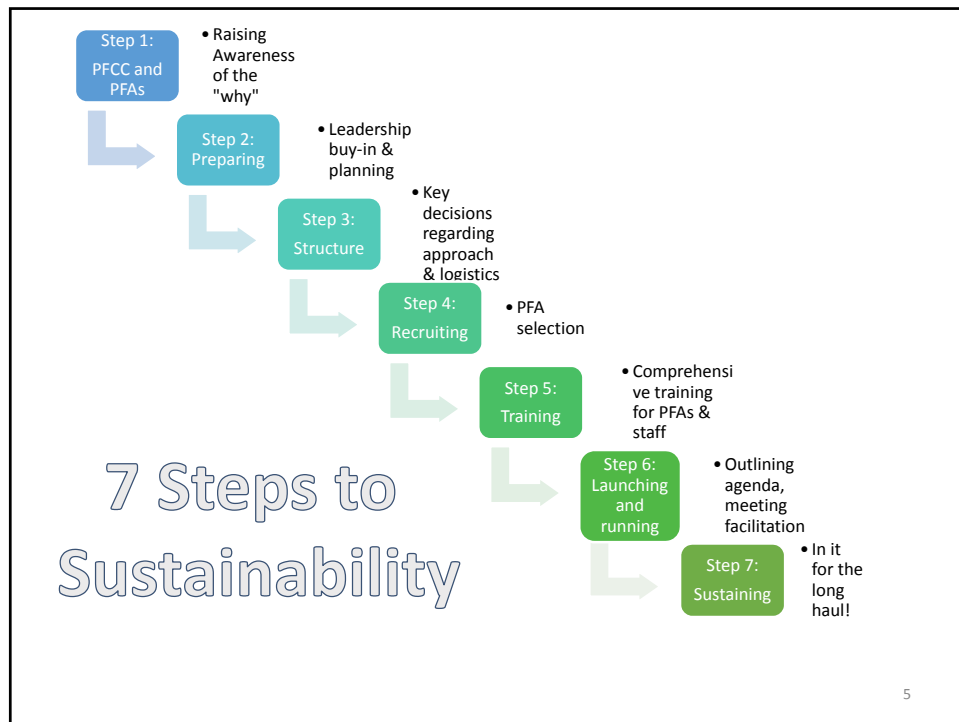
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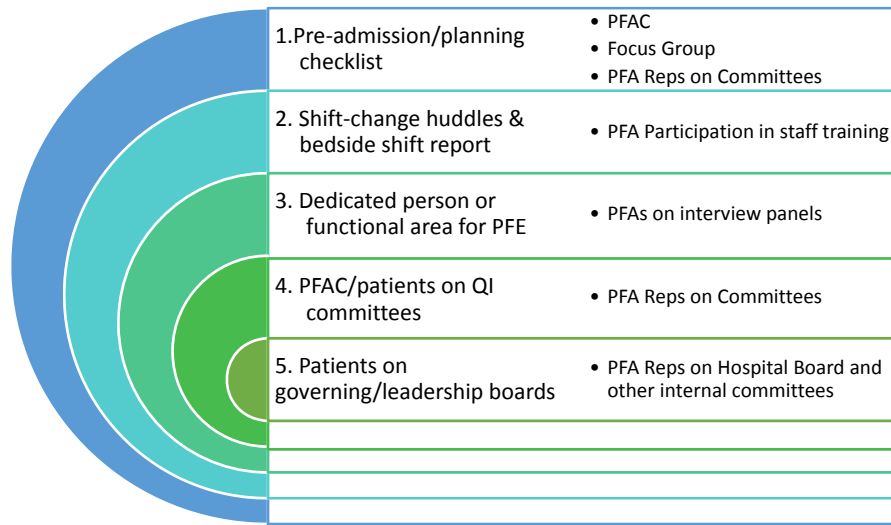
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## Operationalizing your PFA Program: 7 Steps to Sustainability



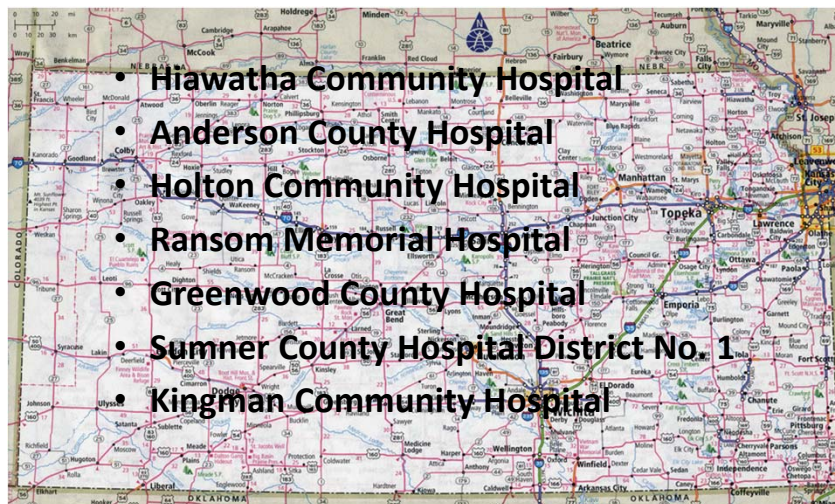


## PFA Programs & PFE Criteria



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## PFAC Collaborative Site Visits: July/August 2018



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## 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:

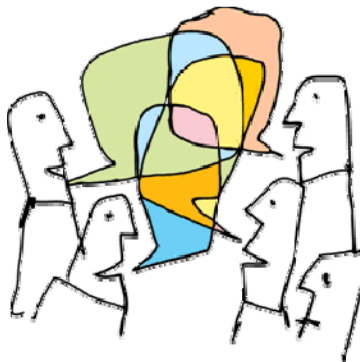
Utilize KHC HIIN Online Toolkit

Set expectations: Include Delegation of Duties in PFA  
“job description”

Collaborate with Kansas HIIN colleagues via Listserv

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## Encouraging PFAs to assume responsibility for running the PFAC



- Appointing a patient/family co-chair
- Recruiting & mentoring new members

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## PFAC Delegation of Duties

STAFF	VOLUNTEER
<b>Volunteer Coordinator</b> <ul style="list-style-type: none"> <li>Send PFAC application to interested applicants</li> <li>Collect and file completed applications</li> <li>Request background checks from Volunteer Services office</li> <li>Maintain volunteer files for all volunteer patient/family advisors</li> </ul>	<b>New Applicant Greeter</b> <ul style="list-style-type: none"> <li>Initiate contact with potential PFAC applicants</li> <li>Use guide to explain PFAC Program and process for becoming a patient/family advisor</li> <li>Forward names of interested applicants to PFAC Coordinator</li> </ul>
<b>Interview Scheduler</b> <ul style="list-style-type: none"> <li>Schedule 30-minute interviews for new PFAC advisor applicants with:                             <ul style="list-style-type: none"> <li>At least one member of PFAC executive team</li> <li>One staff advisor</li> <li>Co-chair from this PFAC or another PFAC</li> </ul> </li> </ul>	<b>Meeting Minutes Master</b> <ul style="list-style-type: none"> <li>Record PFAC meeting minutes using Meeting Minutes Template</li> <li>Send meeting minutes to PFAC Coordinator and Meeting Organizer</li> </ul>
<b>Meeting Organizer</b> <ul style="list-style-type: none"> <li>Secure &amp; confirm speakers/presenters for PFAC meeting</li> <li>Complete agenda template</li> <li>Send completed agenda to Meeting Communicator for distribution 1 week prior to PFAC meeting</li> </ul>	<b>Meeting Communicator</b> <ul style="list-style-type: none"> <li>Solicit PFAC Executive Team members for topics/presenters for upcoming PFAC meeting</li> <li>Forward topics and presenters to Meeting Organizer</li> <li>Send completed PFAC meeting agenda (once received from Meeting Organizer) &amp; meeting minutes to all PFAC members</li> </ul>
<b>Tracker</b> <ul style="list-style-type: none"> <li>Update Issue Tracker following each PFAC meeting</li> <li>Share current version of Issue Tracker during PFAC meetings</li> <li>Save updated version of Issue Tracker on PFAC SharePoint site</li> </ul>	

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## 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

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## 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

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## Hospital Sharing: Greenwood County



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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

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## 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

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## 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

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## 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.



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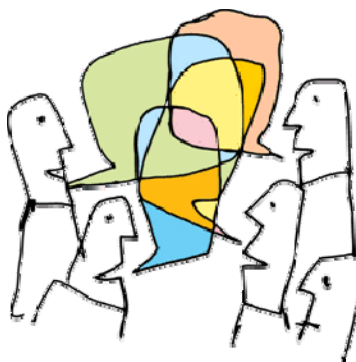
## Anderson County Hospital

- 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.



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## PFA role in building/maintaining community relationships



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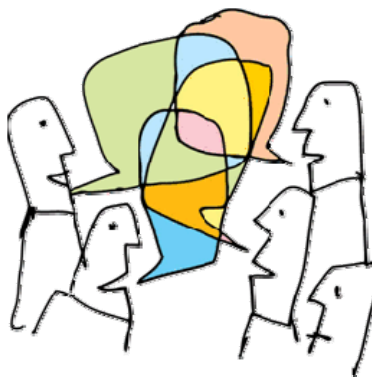
## PFA role in building/maintaining community relationships

- 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



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## Open Forum



**Allison Chrestensen**

Principal Consultant

Tandem Healthcare Solutions

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**Tiffany Christensen**

Vice President, Experience Innovation

The Beryl Institute

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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*

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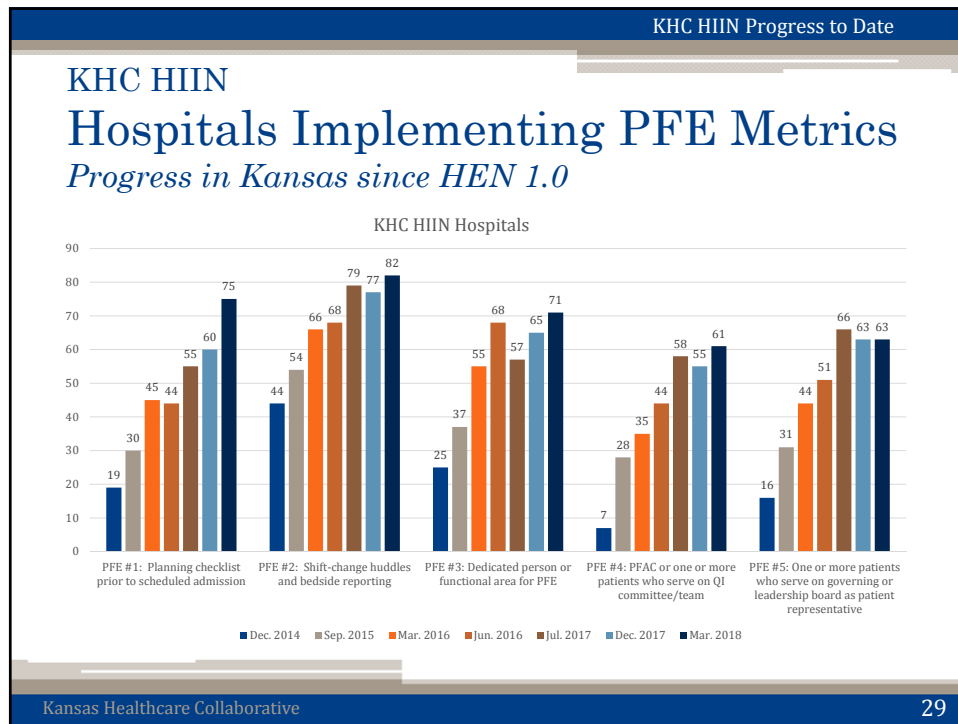
## **Track 1: Back-to-Basics or “Reboot”**

*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.

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Patient and Family Engagement

## KHC HIIN Hospitals Implementing PFE Metrics

Number of PFE Metrics Met	Number of Hospitals
1 or more	95 (80%)
2 or more	87 (73%)
3 or more	76 (64%)
4 or more	66 (55%)
All 5	40 (34%)

Out of 119 Facilities responding during 2Q2018

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## 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)





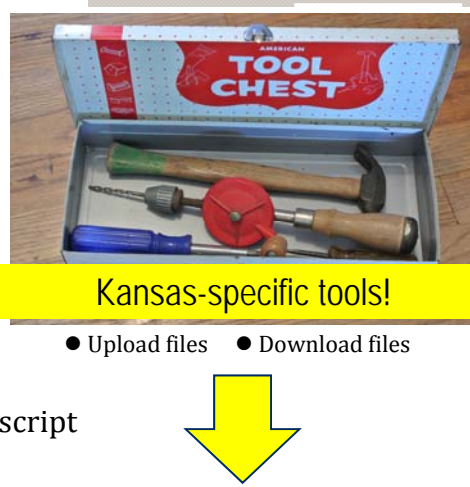
## Resources

- 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

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## KHC PFAC Collaborative Living Toolkit!

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



**Kansas-specific tools!**

● Upload files   ● Download files

**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.*

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## PFA/PFAC Collaborative Living Toolkit

### EXAMPLES – RESOURCES YOU CAN USE

Shared Folders > HIIN > Kansas PFAC

**Kansas PFAC** More Options

Items in this Folder   People on this Folder

Name
Kansas PFAC Collaborative - support items
Step 1 - Raising Awareness of Why
Step 2 - Preparing- Leadership Buy-in and Planning
Step 3 - Structure- Key decisions about approach
Step 4 - Recruiting
Step 5 - Training and Orienting PFAs
Step 6 - Launching and Running
Step 7 - Sustainability

Shared Folders > HIIN > Kansas PFAC > Step 5 - Training and Orienting PFAs

**Step 5 - Training and Orienting PFAs** More Options

Items in this Folder   People on this Folder

Name	Size	Uploaded	Creator
021c - Confidentiality Statement - Observer (2).doc	35 KB	9/20/17	J. Keen
Advisor Handbook.docx	1 MB	9/20/17	J. Keen
Bottom Line of PFA Communication Postcard.docx	99 KB	3/20/17	M. Clark
Family Liaison Coordinator job Description.docx	16 KB	3/20/17	M. Clark
Focusing on PFA communication in a PFAC meeting.mp4	20 MB	3/20/17	M. Clark
Focusing on PFA Communication KHC 2017.docx	400 KB	3/20/17	M. Clark
Focusing on Staff Communication in a PFAC meeting.mp4	12 MB	3/20/17	M. Clark
Focusing on Staff Communication_KHC 2017.docx	328 KB	3/20/17	M. Clark
notebook kit-binder cover sample.docx	750 KB	9/20/17	J. Keen
Orientation Plan.docx	25 KB	9/20/17	J. Keen
Patient Centered Care.docx	26 KB	9/20/17	J. Keen
PFA binder table of contents.docx	677 KB	9/20/17	J. Keen
PFAC Advisor Training Power Point.pptx	7 MB	9/20/17	J. Keen
PFAC Training 2016 Power Point.pptx	7 MB	9/20/17	J. Keen

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**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

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

**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


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## PFA/PFAC Collaborative Toolkit

### INSTRUCTIONAL VIDEOS

*Also organized around the 7 steps*

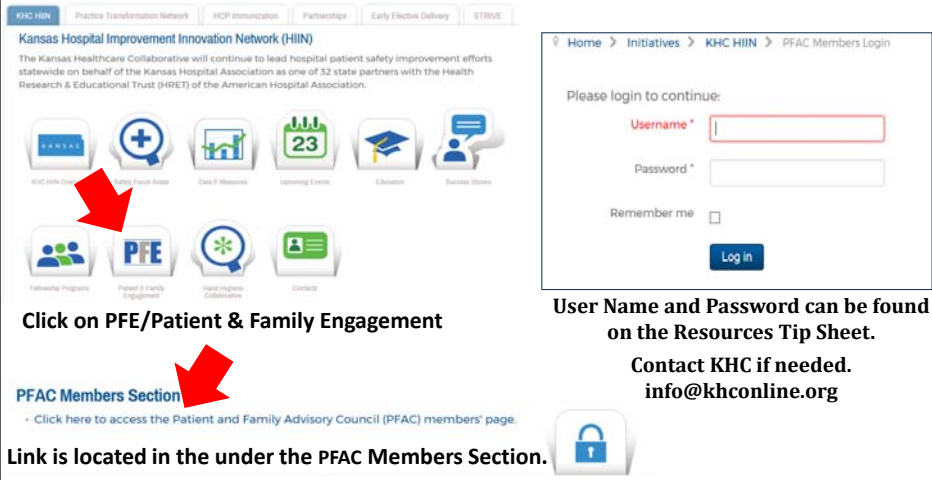


**Moving to KHC website!**  
New password-protected link to video page will be provided  
by Nov. 12 Track 1 webinar

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## Gaining Access to the PFAC Members Website from khconline.org



**Click on PFE/Patient & Family Engagement**

**PFAC Members Section**

Link is located in the under the PFAC Members Section.

Please login to continue:  
Username \*   
Password \*   
Remember me ☐  
**Log in**

User Name and Password can be found on the Resources Tip Sheet.  
Contact KHC if needed.  
info@khconline.org

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## 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>

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## Full Schedule

### INDIVIDUALIZED COACHING CALLS

*with Tiffany or Allison*

*Typically 15 minutes each*  
*1<sup>st</sup> Mondays: 8:30 – 10:30 a.m.*  
*3<sup>rd</sup> 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

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## 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.*

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## 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**  
<https://www.khconline.org/initiatives/hiin/patient-and-family-engagement-pfe>

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## 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>

**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.

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Your KHC Team



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Questions?



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