Planetree Recognition Program

Alan Manning
Chief Operating Officer, Planetree
This?
Or this?
We wish!
What we do

- Advocate
- Solution Provider
- Standard Setter
A structured pathway to Patient Centered excellence across the care continuum
Recognition for Progress Along the Way

Bronze Recognition
Meaningful Progress

Silver Recognition
Significant Advancement

Gold Designation
Excellence

www.planetree.org
What you need to know about the criteria

Integrated
• Not setting specific

Universal in Concept
• International set developed to accommodate cultural nuances

Directive, Not Prescriptive
• Examples to clarify intent
• Supportive of innovative and customized solutions
The **Core** of Designation

I. Structures and Functions Necessary for Culture Change
II. Human Interactions/ Independence, Dignity, and Choice
III. Promoting Patient Education, Choice & Responsibility
IV. Family Involvement
V. Food, Dining & Nutrition
VI. Healing Environment: Architecture and Design
VII. Arts Program. Meaningful Activities and Entertainment
VIII. Spirituality & Diversity
IX. Integrative Therapies/ Paths to Well-Being
X. Healthy Communities/ Enhancement of Life’s Journey
XI. Measurement

Evidence Based  
Experience Based
A new breed of **RECOGNITION** program

<table>
<thead>
<tr>
<th>Accreditation</th>
<th>Planetree Designation</th>
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<tbody>
<tr>
<td>• Certification of Competency</td>
<td>• Celebration of Excellence</td>
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<tr>
<td>• Evaluation of compliance</td>
<td>• Raising the bar for what it means to be</td>
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<td>with minimum standards &amp;</td>
<td>patient-centered</td>
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<td>requirements</td>
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Validated on-site

The Reports:

• You’ll have overwhelming joy
• You’ll be scared
• You’ll see the universe differently
• You’ll gain instant vulnerability

The Lived Experience
“Standing on the shoulders of giants”

• We offer additional perspective

• We offer additional **POWER** to your work
• I.C: Collect qualitative data on patient experience
• I.D: Communication of PCC goals and metrics with all stakeholders
• II.E: Active teams address patient-centered initiatives
• II.F: Formalized processes are in place to promote continuity, consistency and accountability in care delivery, and which allow staff the opportunity and responsibility for personalizing care in partnership with each patient.
• II.N: Formalized communication processes are in place to ensure patients’ individualized needs are evaluated, discussed and accommodated.
• III.A: Transparency in sharing clinical information, including medical record, is available for patients.
• III.B: A range of educational resources, including consumer health, is available for patients and families.
• III.C: Patients are provided with discharge/transition instructions.
• III.D: A process to patients and families in managing their medical information and coordinating the care with multiple physicians. An example is a 57% patient portal.
• IV.C: A process to encourage patients and families to communicate with staff any concerns related their care.
• IX.C: Patients’ health and wellness needs are approached holistically. Caregivers assess the ability of each patient and family member to self-manage their healthcare need and support is available, as needed, to enhance self-management abilities.
• IX.D: A plan is developed and implemented for providing holistic and dignified end-of-life care.
• X.A: Based on the interests and needs of the community, a plan is developed to improve community health
• X.C: The organization works with other local healthcare providers across the continuum of care to improve care coordination, communication and information exchanges around the needs of each patient/family, especially during transitions of care.
• XI.A: Collect data on measures of patient experience and use the data to drive change
• XI.B: Collect data on measures of clinical quality and use the data to drive change
• XI.D: Staff and patient/family members are actively involved in the design, ongoing assessment and communication of performance improvement efforts

Planetree Bronze Criteria satisfied by NCQA certification
57%

www.planetree.org
**Challenge:** Compliance  
**Solution:** Check Lists

**Challenge:** Culture Change  
**Solution:** Purpose and Structures

- Patient Co-Design
- Promotion of Trusting Relationships
- Patient Engagement
- Healing Environment
- Staff Training & Support

**Challenge:** Patient Co-Design  
**Solution:** Promotion of Trusting Relationships

**Challenge:** Patient Engagement  
**Solution:** Healing Environment

**Challenge:** Staff Training & Support  
**Solution:** Purpose and Structures
Raising the Bar with Planetree Designation

**Patient and Family Engagement**

I.E. Patient and Family Partnership Council

VIII.A. Accommodation of patient values and preferences in care planning

IV.A. Support for family presence during all aspects of visit

**Staff training and support**

II.A. Staff participation in experiential patient-centered immersion program

II.G. Care for the caregiver plan

II.J. Practice staff satisfaction survey

**Promotion of authentic, trusting relationships**

II.H. Patient-centeredness embedded into human resources systems

IX.B. Care provided with gentleness

**Patient co-design**

VI.A. Users of space involved in office and clinical design efforts

**Healing Environment**

VI.F. The environment accommodates privacy needs and provides for patient dignity and modesty.
HRH Care Case Study

*Planetree Propels Safety Net Health Center’s Achievement of Level 3 Patient-Centered Medical Home Recognition*

- Connected with other likeminded organizations to gain new ideas and perspectives
- Restructured care delivery to engage patients (in a previously disenfranchised setting)
- Created a Planetree Training Institute to (1) educate ALL members of the care team and (2) cultivate a deeper sense of purpose among the entire team
- Harnessed patient voice - as a FQHC, 51% of the board are users of the health center; supplemented this input with ongoing patient focus groups; engaging patients as mystery shoppers and enlisting patients as data collectors for time motion studies
- Quality improvement was decentralized, allowing staff active participation in local change

“The grounding in our Planetree philosophy made a tremendous difference in how we did things. We had experience in looking at how our programs impact patients and we are focused on listening to the voices of our patients. We respond to their concerns and design our programs accordingly. That experience has really made us so successful in really reaching our patients.”

– Kathy Brieger, Executive Director, HRHCare Planetree Training Institute
“Within our system, we have pursued and received both NCQA PCMH certification and Planetree Designation, and while PCMH assisted in the improvement of clinic operations, Planetree Designation was the key to transforming the care experience for patients, families and staff members.”

- Dr. Dael Waxman, Interim Chair, Dept. of Family Medicine, Carolinas Healthcare System
Alan Manning  
Chief Operating Officer  
Planetree, Inc  

amanning@planetree.org  
203-732-1381