

Mini Summit III: Patient and Family Engagement

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Medical Home Summit
San Francisco, California

Patient and Family Advisory Councils

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What I'll Cover

- My Journey of Discovery as a Patient and a Healthcare Professional
- Patient and Family Advisory Councils
 - What, Why and How
- Examples of Authentic Partnerships
 - PHMG Patent Advisory Council
 - Quality Corporation's Patients and Families as Leaders Initiative

Looking Back 30_{some} Years....



Patient- and Family- Centered Principles

- People are treated with respect and dignity
- Health care providers communicate and share complete information in useful and affirming ways
- Individuals and families build on their strengths through participation in experiences that enhance control and independence
- Collaboration among patients, families and health care occurs in policy and program development and professional education as well as in the delivery of care

Simple yet Transformational!

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

The patient's and family's experience **can** be the driver for quality improvement.

Quality is more than technical quality.

Show Me the Data..

- PCC reduces:
 - Under use and over use of medical services
 - Unnecessary test and referral related costs
 - Reduces risk factors that lead to malpractice suits
- AHRQ Evidence of PFCC reduces Morbidity and Mortality

Improved health status; encourages adherence to treatment plans, lessens the symptom burden on patients, decreases misdiagnoses from poor communication

References at www.ipfcc.org



Change The Assumptions

Assume *patients* are the *experts* on their own experience and that they have information *you need to hear and act on.*

Know that *families* are *primary partners* in a patient's experience and health.





Journey to Patient- and Family-Centered Care:

- Breast Cancer survivors participate in redesign of decision support
- Ortho patients/families participate in redesign of Orthopedics Remodel and process
- Patient/Families Contribute to design of new hospital and key processes - Sacred Heart Medical Center at RiverBend
- Patient/Families help lead Pursuing Perfection Grant in Bellingham, WA in partnership with innovative healthcare leaders
- PeaceHealth Medical Group identifies Patient-Centered Care as a major strategic initiative and utilizes patient family advisors in creating framework for "Idealized Patient Experience"

Patient and Family Advisory Councils

- Formal mechanism within an organization to create authentic partnerships
- Establishes ongoing relationships over time with regular meeting times and terms of service
- Seeks diverse perspectives representing the populations served
- Organizational leadership sponsors the effort
- Council provides input vehicle for a variety of topics/issues
- Role of Advisors:
 - Partners in key areas within the organization [quality, safety, program development, policy]
 - Initiates and identifies opportunities for improvement in patient experience of care

One Leader's Experience

“Thank you SO much for inviting me to your Advisor Council Meeting. I can’t begin to tell you how awed, inspired and hopeful I feel about your endeavors. It’s exciting to see a clinic blaze new trails and have such energy and enthusiasm pushing them forward. I literally could not sleep last night, even though my body was so tired. And to think that this revolutionary medical delivery model is happening right here in Oregon. WOW!

Quality Improvement Director of Integrated Delivery System

Getting Started to Establish Advisory Councils

- Clarify purpose and alignment with organization's mission
- Identify executive sponsor and liaison role within organization to support the effort
- Utilize existing structures to support recruitment, orientation and mentoring of advisors
- Begin outreach through trusted networks/relationships-physician and staff referrals
- Build small successes and share the stories
- Connect with national resources: www.ipfcc.org

Recruitment Tools

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.

Sincerely,



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



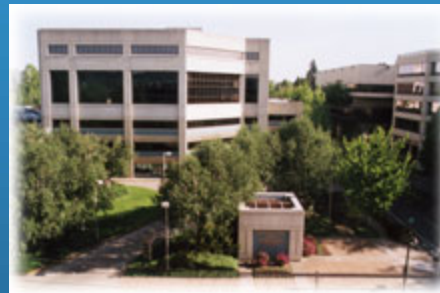
Two Case Studies

- Patient Advisory Council at PeaceHealth Medical Group
- Statewide Initiative to Embed Patient and Family Advisory Councils in Primary Care Settings in multiple organizations



PeaceHealth
Medical Group

- Multi-specialty Group in 9 sites
 - Eugene, Springfield, Junction City
- 130 physicians in a multi-specialty practice:
 - Primary Care (70+) Specialty Services (60+)
- 383,000 outpatient visits/yr; ~ 125,00 p

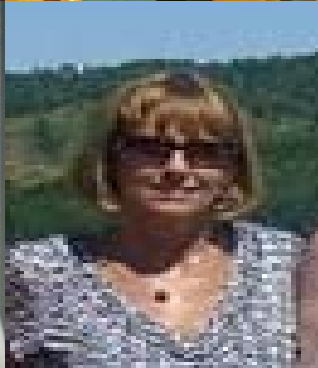




Patient Advisors at PHMG

- Patient Advisors participate in Quality Improvement teams on Medication Safety & Reconciliation, Diabetes Improvement and Strategic Planning on *"Ideal Patient Experience"*
- Initial year - 14 members on Patient Advisory Council
- Patient Advisors Panel presentation at the ADVANCE! 2008
- 2 Patient Advisors on Medication Oversight Team
- 37 Patient Advisors provide input to RiverBend Pavilion Clinic processes and design
- Patients set-up Open Space at ADVANCE! 2009/2010
- 3 Patient Advisors participate in training on Patient Safety and bring back ideas that launch a video for new patients on Teamwork and Safety
- PAC provided ongoing input and participate in pilots for a AHRQ federally funded Medication Safety Grant 2008-2010

PHMG Patient Advisory Council



Patient Advisor Charter

1. To assure alignment and integration of patient and family centered care within PHMG,
2. The PAC will serve as a formal mechanism for involving patients and families in policy and program decision making in our clinics. Examples of PAC involvement includes but is not limited to:
 - Champions of Patient Centered Care
 - Input on Communication Materials
 - Identification of areas for improvement in service quality
 - Input on teams, project and recruitment of other patient advisors
 - Input on strategic plan for model of care across the system

Consent to Treat- One Patient Experience

Problem: Form was not consistent with partnership values communicated by PHMG

Approach: Patient Advisors reviewed form, made recommendations to Risk Management and Leadership

Outcome: Redesign of form completed

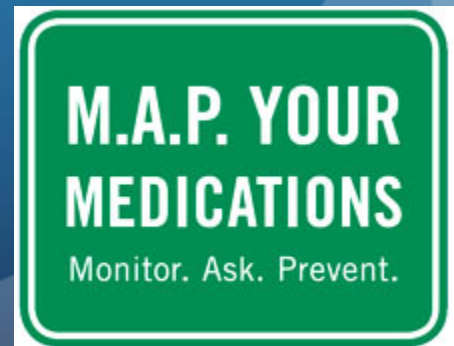
Consent Form Example

Before: The undersigned hereby consent to all treatments, photographing of patient or procedures, diagnostic procedures, all or any of which is deemed necessary or advisable by the doctor, the doctor's associates or assistants, at this or any future clinic visits. I understand that I have the right at any time to withdraw my consent and refuse treatment.

After: I have chosen to receive medical services from PeaceHealth Medical Group. I agree to all treatments that are necessary or advisable by the doctor, and the doctor's associates or assistants, today and at any future clinic visits. At any time, I have the right to change my mind and withdraw my agreement for treatment.

Medication Oversight Safety Team

- Patient - Family Advisors joined QI Safety initiative to support medication reconciliation efforts underway
- Initiated patient education effort to improve medication partnership
- Advisors continue to do community outreach at senior centers and encourage sustained focus by the organization on this important topic



Patient Advisors Promoting Self-Management

*“Your Health Care and Safety -
The Team Approach at PeaceHealth”*

<http://www.peacehealth.org/phmg/eugene-springfield/eugene-springfield-locations/patient-services/new-patients/Pages/team-approach-introduction.aspx>

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CMO Feedback to Patient Advisory Council

Your input helps us think differently

1. We know we do not have a full evaluation process of our clinician's performance because we have not integrated patient input
2. The experience of care starts at the first encounter and inviting patients in early, changes the outcome

“Your enthusiasm and commitment fuel us during challenging times and keeps us focused on what’s really important!”

Patients and Families as Leaders

Transforming Patient and Family Engagement in Oregon

2010- 2011



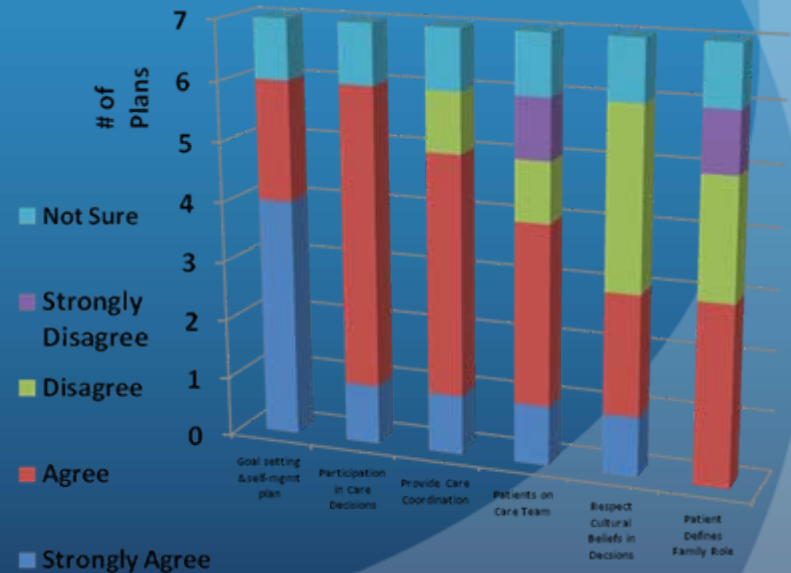
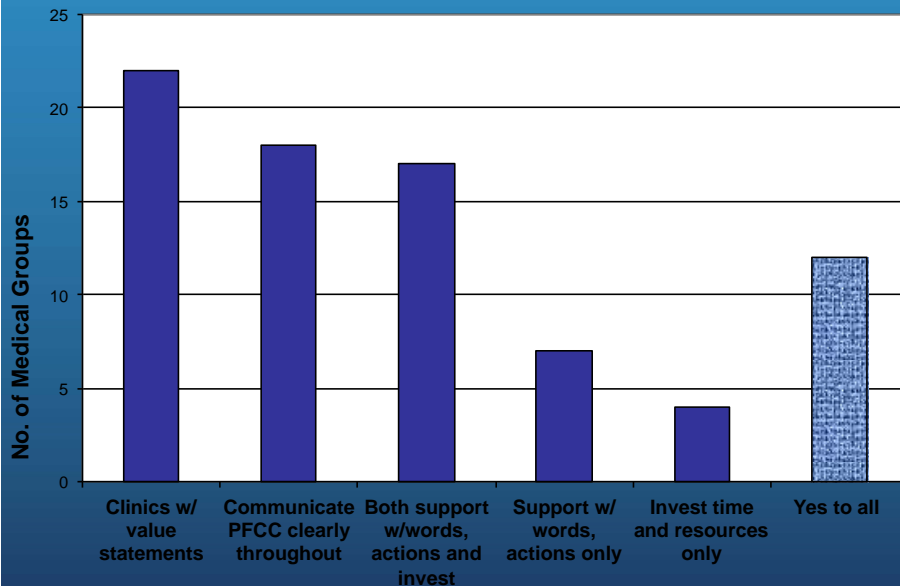
Project Goals

- Identify current PFCC best practices in Oregon
- Provide technical assistance to six organizations
 - 1 Medicaid Health Plan
 - 2 Provider Owned P.C. Organizations
 - 2 Integrated Health System P.C. Clinics
 - 1 Federally Qualified Health Clinic (Leadership change-discontinued)
- Provide assistance through monthly e-newsletter, resource materials, conference calls, and two statewide events to a wide range of interested organizations

Assessment of Patient- and Family-Centered Care Practices

- Web-based survey of 90+ primary care clinics and 7 health plans to assess level of patient- and family-centered practices
- 33% and 78% response rate from clinics and payors
- Less than 6% utilize patient and family advisors

Medical Group Leadership Practices and Engagement [N=33]



Quick Facts

- 71 Active patient advisors in the program
- 5 Active organizations establishing Advisory Councils
- 44 Leaders of health care organizations on the statewide Learning Network Distribution List
- 52 Advisors on the statewide Patient Advisor Learning Network List

Progress: Practical Strategies



- Personal Touch and Face to Face Connections
- Virtual Networks Connecting Patients and Organizations
- Make It Visible! Print and Social Media



CareOregon: A Health Plan's Experience



- Member Advisory Committee established – Fall 2010
- Steering Committee creates by-laws, posts video stories on the CareOregon website – Winter 2011
- MAC hosts a member Open House to inform members of their role – Winter 2011
- MAC members participate in Health Care Action Day at the Oregon Legislature – Spring 2011
- Shared Care Card – tools for use between physician and patient being designed – Summer 2011



Patient and Family Advisory Council



- Critical Steps to Launch Effective Partnerships:
 - Key leaders attended National Seminar on Patient- and Family-Centered Care [PFCC]
 - Presented key PFCC concepts to Service Improvement Committee
 - Senior physician leader referred the first patient as an advisor and challenged to do the same.
 - Staff patient advisor liaison hired
- Council launched April 2011 - focus patient and family engagement in the Patient-Centered Primary Care Home implementation efforts

Bumps in the Road

- **Distracted Leadership**

Strategies: Patient Stories; align with other key organizational objectives, be persistent

- **Inadequate Resource Allocation**

Strategies: Budget; utilize existing resources creatively

- **Insincere Patient Advisor Partnerships**

Strategies: Involve patients early; embed in organizational structure

- **Inadequate Orientation and Mentoring of Patient Advisors**

Strategies: Use volunteer services; meet & greet

Transform the System: Begin TODAY!

- In the moment, ask one patient/family member what's one thing we could do to improve your experience?
- Bring patients and families together to share stories with healthcare professionals- act on your new insights and look for small changes- let them know what changes you have made
- Actively recruit patients/families to participate in redesign process
- Change the sequence of patient/family focus groups- ask before design then use input in design

Critical Factors to Keep in Mind

- **Meaningful Participation**
 - Appropriate assessment and coaching & matching patients to opportunities
- **Human anxiety/ fear of retribution- vulnerability**
 - Communication skill development that emphasizes listening/respecting; leadership behavior that acts on patient/family information
- **Underestimating support for growing new roles**
 - Education, developmental support, safe opportunities to learn new skills; facilitators/coaches

Outcomes/Benefits

- Patients/Families are motivators - provide hope and dampens cynicism
- Reduces burden for healthcare team
- Creates better tools to meet patient needs and “activate” patients as full partners
- Avoids costly errors in facilities design
- Provides information/knowledge to make better business decisions
- Broadens perspectives - acting into new ways of thinking

For More Information, Contact: Mary Minniti, BS CPHQ mminniti@gmail.com

Websites of Interest:

- Institute for Patient- and Family-Centered Care:

www.ipfcc.org

- Oregon Health Care Quality Corporation-Patient and Family Engagement Website:

<http://q-corp.org/programs/patient-centered-care>

- Patient and Families as Leaders Learning Network Newsletters:

<http://q-corp.org/programs/patient-centered-care/resources>

- CareOregon Member Advisory Council website articles index:

<http://www.careoregon.org/SearchResults.aspx?IndexCatalogues=CareOregonIndex&SearchQuery=MAC>

- St. Charles Family Care- Redmond

<http://www.stcharlesfamilycareredmond.org/cascade-medical-clinic-news-updates.html>

- Oregon Medical Group- Advisory Council Application Form

<http://www.oregonmedicalgroup.com/index/cfm/fuseaction/site.content/mode/dtl/type/74370/post/59347.cfm>