Title:

Patient and Family Advisory Council System Structure in One Year

Focus of Application:

Patient Experience
SUTTER HEALTH PATIENT ADVISORS

May 23, 2017

To The Hospital Quality Institute:

It has been delightful and engaging to witness the development of the Patient and Family Advisory Council program at Sutter Health in the last year. We have seen tremendous growth in this program and we now have patient and family advisors available to participate in any project across the organization. We have over 140 patient and family advisors and an online request form so staff at every level of Sutter Health have the ability to engage PFA in their work. In this first year we have done strong work to engage and partner with our patients and to listen to what they can tell us. Their experience, stories and partnership are changing the way we improve and redesign process improvement projects. Focusing on patient experience as a top priority and aligning all clinical teams under that umbrella gives us a unique opportunity to break down silos, and improve care from the patient and family perspective. We are grateful to HQI for initiating the Gateway Program in our organization.

Sincerely,

[Signature]

Don Wreden MD

SVP Patient Experience, Sutter Health.

May 9, 2017
Executive Summary

Sutter Health, a not for profit healthcare system in Northern California, embarked on a one year journey to establish a network of Patient and Family Advisory Councils (PFAC) across the organization. Utilizing standard work processes and guided support from PFCCpartners, Sutter Health established 15 new PFAC for a total of 20 active councils. The work to engage Patient and Family Advisors (PFA) was part of the vision of the newly created Office of Patient Experience. On February 26, 2016 Sutter Health’s Patient Family Engagement Team (PFE Team), embarked on a journey to engage PFA in all aspects of care by establishing our first cohort of inpatient PFAC. Sutter Health enrolled eight hospitals in the California Hospital Quality Institute (HQI) Engage program (9). Inspired and encouraged by the participation and success of the Engage program, in partnership with PFCCpartners (7), these eight hospitals, along with twelve other California hospitals, began the journey through the Gateways program. In June 2016, six additional healthcare settings joined our second cohort and in April 2017, seven healthcare settings including ambulatory, and home health began their first Gateway call. Our 140 active PFA have captured over 1,500 hours of volunteer work on 110 projects and events.
Background and relevance

In 2010, Sutter Health had started several novel and independent PFAC. These councils functioned independently and in isolation. The councils represented two Neonatal Intensive Care Units, one in the East Bay and one in Sacramento. The adult population was represented by Palo Alto Medical Foundation, Mills Peninsula Medical Center, Eden Medical Center, and Sutter Lakeside Hospital. Each organization had initiated a PFAC in the last 7 years. Leaders at these affiliates had realized the value of establishing formal structures for patients to participate in process improvement projects (5, 6, 8) and peer support. There was strong support from the community and the organizations as these affiliates began to grow their PFAC.

In 2015, the Office of Patient Experience was established to, “unite and support teams to provide a consistently excellent and personalized experience for the patients and families we serve. Together, we create a culture of empowered and engaged patients and caregivers as we design and adopt best practices to deliver the highest quality patient care.” This group is made up of 10 teams representing: physician leadership, nursing leadership, research, variation reduction, quality, safety, access to care, patient and family engagement and population health. The formalization of this system department provided a foundation for the development of the PFE Team and the structure for building Patient and Family Advisors into all of our process improvement work. Our goal was to standardize a system wide approach across the organization to integrate patients and PFA into local and system improvement projects.
Description

Scope

On February 26, 2016 Sutter Health’s PFE Team, embarked on a journey to engage PFA in all aspects of care by establishing hospital, clinic and homecare PFAC. In the first phase, eight Sutter hospitals enrolled in the California Hospital Quality Institute (HQI) Engage program (9) in partnership with PFCCpartners (7). These eight hospitals, along with 12 other California hospitals, attended a kick-off meeting and began our journey through the Gateways program to establish PFAC. The first Gateway call (figure 1) in April 2016, to establish the foundation for setting up our PFAC. (1, 2, 5). This foundation would grow to include two more cohorts of Sutter Health care settings in the next year.

Processes

During the first Gateway cohort we developed a web page, collaborative site and established standard work for the eight affiliates participating in this program. All teams utilized the collaborative site to obtain templates for standard work, and to post their progress and affiliate documents such as charters and vision statements. We developed a Sutter Health system recruitment strategy and orientation manual which all teams utilize. This standard work saved the affiliates time and resources and allowed our PFA to have the same recruitment, on-boarding approach and overview of the organization. This standard process enabled PFA to have the same experience and orientation so they were all equally prepared to participate in local or system projects.

Strategies

We developed a communication plan to share the work and promote the program. We traveled to all hospitals and medical foundations sharing the program and availability of PFA to participate in process improvement projects, speaking engagements and events. We developed an online request form which
allowed any team in the organization to reach out to the PFE Team to obtain PFA for their projects. In addition we developed a web page http://www.sutterhealth.org/patient-advisory-council/index.html for external recruitment so potential PFAs could get information about our program and view our quarterly newsletters.

**Tactics**

Lastly we established a scheduling and tracking tool for all of our PFA so we could manage their profiles, scheduling, communication and tracking of volunteer hours. This tool is utilized across the organization so all PFA can see upcoming calendar events, log their hours, and set up their profiles. Through the reporting capability of this tool we can track the total PFA hours for the organization by affiliate type of event or projects. We can also track when a PFA has an annual anniversary or reached volunteer hour milestones.

**Challenges**

In June 2016, we developed a Sutter Health Patient Experience System Council (SHPX) to meet the needs of the organization. We were getting more online requests for PFA than we had local members. This SHPX group was established to foster partnerships with PFA across the Sutter Health system to infuse patient and family perspectives into system driven improvement projects and initiatives. The most challenging aspect of the project is recruitment. We created brochures and placed these in hospital and clinic settings however, they yielded very few participants. We developed posters for the hospital elevators and waiting areas these too proved to not be as effective as we had envisioned. We attended local college events, community churches and a local senior center and recruited a few patient advisors but the results were minimal and time intensive. Then we placed a recruitment add on the Sutter Health My Health Online website, that is utilized by our patients to review lab results, schedule appointments and communicate to their providers. In one month we received 228 referrals for potential advisors. The next challenge was that we had patients with an interest across the entire organization, but not always a
local council to place them. We began our standard phone call screening and either referred them to a local PFAC or we sent out applications to the patients that passed the phone screening process. We then reviewed the applications and began panel interviews. We had excellent PFA for our SHPX Council which has become a bridge platform for onboarding and training of system advisors who can be placed at local PFAC as the council becomes ready. This group meets monthly and we have participants from the other PFAC join this meeting thus creating a network of sharing and reporting across the organization.

Another challenge has been to teach the teams to use the scheduling and tracking tool. The PFE Team meets monthly with PFAC leaders to find out what their achievements and barriers are. This monthly call has helped to manage support and encourage the use of standard tools and processes. This ongoing support and nurturing is essential for the continual growth and success of this program. Staff turnover has been another issue we have faced and we strongly encourage all PFAC leads to have a dyad partner.

**Results**

Through the Office of Patient Experience our goals are to:

- Partner with our patients and families to provide an exceptional patient experience.
- Engage Patient Family Advisors across our network to gain and learn from their unique perspectives.
- Establish standard, unified approaches to put patients at the center of all we do.
- Model best practices that position our care teams and patients for success.

In one year we now have 140 PFAs, 20 PFAC and logged 1,500 hours of volunteer time in over 110 projects or events. Our online request tool has placed patients in projects such as: quality improvement, technology pilots, end-of-life communications, patient education and health literacy, lean projects, telemedicine, urgent care, Emergency Room wait times, and focus groups. We continue to grow and learn from our deployment process. What is most satisfying is that our patients have redirected projects and opened our eyes to see what we cannot see. They have begun to change the way we approach all aspects
of process improvement projects and teams are beginning to realize the value of engaging patient and family advisors early in their project work. The patients are seen as equal and valued members of the team.

**Sustainment and Scale**

As of April, 2017 we have seven new healthcare settings beginning the Gateway Program with PFCC partners (figure 4) These seven settings include three hospitals one Medical Foundation, Home Care and two ICU groups. We continue to meet with system and affiliate teams to promote the use of PFA and we are beginning to receive requests for their participation outside of Sutter Health. As we continue to grow we plan to reach further into our community to expand our diversity and support disease specific care needs. In addition we envision a seamless humanized patient experience. To do this we need to work on the culture of our organization ensuring joy in the work place and compassion from our providers and staff. We will be integrating the patient stories and their voice and experiences into this work. A recent patient story called “Powered by Kate” brought two families together to tell the story of a donor and a transplant recipient who is a PFA [https://www.youtube.com/watch?v=vE5YuoemRBk](https://www.youtube.com/watch?v=vE5YuoemRBk). This story reconnected staff to the purpose of their work and connected ourselves to these patients demonstrating that every person in the healthcare setting plays an instrumental role in the lives of our patients. This work takes commitment, determination and leadership support, and it is some of the most fulfilling work we have ever participated in. Laura, a PFA, commented, “It is so refreshing to see and hear of the changes going on in healthcare, and when I hear people in the community complain about their healthcare experience I tell them, you have a voice… you can join a Patient Family Advisory group and be heard.”

**Lessons Learned**

The communication plan we developed early on was essential in socializing this work, establishing our messaging for internal and external communication and for setting up our collaborative site and web page.
Meeting the staff launching PFAC and understanding the needs and priorities of their organization and community was pivotal to the success of each council. The PFE Team made 34 site visits across Northern California meeting with Sutter Health medical foundations and hospitals. We traveled over 10,000 miles visiting teams and connecting to support; panel interviews, orientations, and first meetings helping to support teams as they launched PFAC at their organizations. We provided over 50 presentations to different groups to socialize this work and share the online request process so any project can easily involve a PFA.

Project management was key to establishing a detailed project plan. We meet weekly to update the plan and tasks to stay focused and on track. Our project plan needs to stay true to our vision “The PFE Team partners with PFA across the Sutter Health system to infuse patient and family perspectives into system driven improvement projects and initiatives.” The support of PFCC partners has been critical to our success. Libby Hoy, CEO and founder mentored us, counseled, and led learning sessions that allowed us to learn, test, try fail and test again as we grew in our development.

The most vital lesson learned was to select the appropriate community members. Our recruitment process is rigorous. We have many potential PFA that do not complete the process, many self-select out. We look for patients and family members who are passionate about giving back and using their experiences to make positive change. We have learned that it is important for PFA to have an open mind and be willing to learn how they can best be partners with staff. Ensuring the right patient for the right project is essential so both the requesting team and the PFA feel satisfied and engaged. We developed a survey tool to send to requestors and PFA following a project so we can gauge where we need to make adjustments, in understanding and scope. We continue to work around the barriers and we support teams and partner teams so we can learn and grow together. At Sutter Health our PFA are right by our side as we design the care of the future.


   https://www.ahrq.gov/research/findings/final-reports/ptfamilyscan/ptfamilysum.html


Figure 1
Patient Family Centered Care Partners (PFCCpartners) Gateway Program

Gateways to Engagement Learning Collaborative®

Set the Table
Recruitment
Orientation
Launch Meeting
Sustainability Practices
Figure 2 Web Page for Sutter Health Recruitment

SUTTER HEALTH PATIENT ADVISORS

Figure 3 Sutter Health Patient Family Advisory Councils

Figure 4 Growth of Patient Family Advisors in one year
Figure 5 Sutter Health Projects and Events for Patient Family Advisors
SUTTER HEALTH PATIENT ADVISORS

Palo Alto PFAC

Sutter Amador Patient working on ED throughput

Sutter Health Management Symposium 2016 Patient Advisors and staff

Health Maintenance Material Health Literacy