Partnering with Patients and Families: A Guide to Getting Started for Hospitals

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Partnering with patients and families is a key strategy for achieving your hospital’s goals, including improving patient experience of care and reducing avoidable hospital readmissions and hospital-acquired infections. Working in partnership with Patient and Family Advisors is a key component of providing patient- and family-centered care and is essential as you begin to transform the culture of your facility.

Patient- and Family-Centered Care Core Concepts

- **Dignity and Respect.** Health care practitioners listen to and honor patient and family perspectives and choices. Patient and family knowledge, values, beliefs and cultural backgrounds are incorporated into the planning and delivery of care.

- **Information Sharing.** Health care practitioners communicate and share complete and unbiased information with patients and families in ways that are affirming and useful. Patients and families receive timely, complete and accurate information in order to effectively participate in care and decision-making.

- **Participation.** Patients and families are encouraged and supported in participating in care and decision-making at the level they choose.

- **Collaboration.** Patients, families, health care practitioners and leaders collaborate in policy and program development, implementation and evaluation; in health care facility design; and in professional education, as well as in the delivery of care.

Get Started

Providers and staff can work in collaboration with patients and families in a variety of areas throughout the facility. Below are recommendations to help you begin to work in partnership with patients who receive care at your organization and their family members.

Commit to Partnering with Patients and Families

Successful patient and family partnerships begin with leadership and organization-wide commitment to work in new and different ways with patients and families. Enabling and encouraging patients and their family members to provide input on the way care is delivered at the facility will be uncomfortable for some physicians and staff members. Leadership may need to reinforce their dedication to these changes on a continuous basis and explain the value that patient and family perspectives bring to the organization.

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Specific ways to demonstrate the facility’s commitment to working collaboratively with patients and families include:

- Designate at least one management position to be accountable for implementing and sustaining patient and family partnerships across the facility, including ensuring capacity within that position to undertake the additional responsibility;
- Allocate resources in the annual budget to support patient and family partnerships;
- Reward leadership and staff who demonstrate partnership and patient- and family-centered care with incentives and/or compensation;
- Include updates on the work done in partnership with Advisors as a standing agenda item at Board of Directors/Trustees, executive leadership, management and staff meetings.

Work with Patients and Families in New Ways

Whether or not you establish a formal body, such as a Patient and Family Advisory Council (PFAC), your hospital can benefit from patient and family perspectives. The following are examples of some of the ways you can begin to partner with patients and families in your facility. Select and prioritize the items that will work best for your organization.

Guiding Hospital Policy

Governance
Include Patient and Family Advisors on the hospital’s Board of Directors/Trustees as well as any other decision-making bodies that guide the work of the facility. Partner with Advisors to:

- Review and revise governance documents such as the hospital’s mission, vision, and philosophy of care. Include a clear emphasis on patient- and family-centered care and patient and family partnerships;
- Develop strategic documents such as strategic plans, work plans, or annual reports;
- Establish annual quality improvement goals and priorities for the facility.

Operations
Work collaboratively with Advisors to create, review and revise existing organizational policies impacting patients’ experiences with care delivery. Advisors can be engaged in any of the following ways:

- Human Resources
  - Evaluate and modify job descriptions to ensure patient- and family-centered care principles are integrated into all roles within the facility;
  - Review and update performance evaluations to include clear expectations for partnering with patients and families;
  - Revise hiring policies to enable Patient and Family Advisor involvement in interview processes for potential new employees;
  - Update staff training and education policies to enable and support co-instruction by Patient and Family Advisors.
Quality Improvement and Patient Safety

- Develop and adopt a policy for disclosing errors to patients and families and outlining expectations for investigation and root cause analysis of sentinel events, errors and near misses;
- Assess and modify current policies related to care transitions and communication between the hospital, post-acute organizations and primary care practices;
- Establish a policy that requires Advisor participation on standing and time-limited quality improvement teams to ensure patient and family perspectives are included when enhancing systems and care processes.

Enhancing Care Processes

Together with patients and families, work to ensure the hospital’s procedures, care processes and patient flow support patient- and family-centered care. For example, partner with Advisors in the following ways:

- Analyze patient experience data to better understand the underlying issues and develop solutions to improve the facility;
- Observe the process of care in the emergency department – from triage to the exam room, diagnostic testing, and admission or discharge;
- Assess the process of care for elective surgery – from pre-op to the operating room to post-op, and admission to an inpatient room or discharge;
- Develop guidelines or processes for conducting interdisciplinary rounding at the bedside and nursing change of shift report at the bedside;
- Conduct a systematic and comprehensive document review to update standardized patient forms and templates to make them more understandable and meaningful for patients and families;
- Assess the collection of patient and family educational tools and resources and establish a portfolio including those support materials that are the most useful to patients and families:
  - Select and/or develop shared decision-making tools then pilot and evaluate their implementation
  - Review and improve discharge instructions and patient education materials
  - Develop a process and written materials to support increased knowledge and understanding of medications
- Identify helpful community-based supports and resources for patients and families after discharge and build better connections between the facility and those organizations/systems.
Improving Individual Patient Care and Decision-Making

Viewing patients and families as equal partners helps to ensure individual patient care reflects patient- and family-centered practices and encourages collaboration.

- Treat patients and families as integral and equal members of the care team;
- Involve families or care partners in the provision of care and during examinations and procedures per the patient’s wishes;
- Use shared decision-making processes to determine a patient’s course of treatment;
- Conduct interdisciplinary rounds and nurse change-of-shift report at the bedside with patients and families;
- Begin discharge planning upon admission, considering factors beyond medical treatment, and include patients and families in every step;
- Include family members in discussions around discharge instructions (including any changes or additions to medications) and provide a contact name and phone number the patient and/or family can call with questions;
- Connect patients to reliable community resources and patient self-management support programs to help ensure success and well-being following discharge;
- Make available a range of Advisor-approved informational and educational materials to patients and families (in appropriate languages and education levels);
- Replace “Visiting Hours” policy with a policy that encourages Family Presence—family members (defined broadly) are welcome to be with patients at any time per patients’ wishes.

Monitor Progress and Celebrate

Changing the culture of any organization takes time. It will be important to track your progress along the way to understand the effectiveness of your patient and family partnerships and to recognize the hard work of both Advisors and staff. Early on, identify key indicators that will illustrate how well you are engaging patients and families and how care has improved within the facility. Monitor these indicators and share scores with both Advisors and staff on a regular basis. Some ways to track and monitor progress include:

- Implement a simple tracking tool for logging the activities and outcomes of the work done in partnership with Advisors. Update this tool on a monthly basis;
- Develop a dashboard including your patient and family partnership key indicators to display within the organization. Update performance scores on a monthly or quarterly basis;
- Create an Annual Report describing the great work and accomplishments of the facility as a result of working in partnership with patients and families to share with the community;

Finally, plan to celebrate the completion of projects, Advisor anniversaries and other milestones to help sustain the momentum and positive spirit of working in partnership. Recognize both staff and Advisors for their contributions to the changes taking place with the organization.

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2 For additional information and tools to support tracking and monitoring progress, please refer to the National Partnership for Women & Families’ toolkit – ‘Measuring Impact of PFCC’.