

Patient & Family Engagement

Key Strategies for Patient & Family Engagement

Patient and family engagement is defined as “patients, families, their representatives and health professionals working in active partnership at various levels across the health care system — direct care, organizational design and governance and policy making — to improve health and health care.” (Carman et al, 2013)

Fully integrating the patient and family perspective into culture and operations takes time and flows along a continuum. Numerous strategies and actions may be taken to leverage the valuable perspective of patients and families. Strategies to implement PFE within an organization follow.

- include a patient and family advisor in a focus area or single clinical topic
- use storytelling
- identify and recruit ideal patient and family advisors

Advisors’ feedback can serve to encourage leaders and staff to make patient-centered quality improvements that help organizations meet their mission. Feedback also can be a stepping stone to developing a PFAC or involving more PFAs in additional projects.

An [organizational self-assessment](#) allows an organization to gain insight on the continuum of PFE.

PFAs

According to the Institute for Healthcare Improvement, putting patients and families on improvement teams are “the leverage point with the greatest potential to drive the long-term transformation of the entire system.”

PFAs offer much needed insight on where organizations are thriving, as well as areas that may have opportunity for improvement. PFAs help prioritize improvement projects and come up with new ideas and perspectives.

Identifying and Recruiting Patient Advisors

A key component for successful and beneficial PFE within an organization is to have clear policies and processes for recruiting, interviewing and onboarding.

Key characteristics of an effective PFA:

- share insight and information in ways that others can learn
- move beyond personal experiences to help the organization improve
- have concern for more than just one issue or agenda item
- listen and respect the perspectives of others
- speak comfortably and candidly in a group
- are focused on being constructive and committed to partnership



Materials to provide potential/new advisors:

- information about the purpose, goals and intended outcomes of the project
- clearly defined expectations, including timelines, deadlines and responsibilities
- a designated staff member as a key contact
- helpful background information on the project to help bridge knowledge gaps

Methods to recruit potential members:

- posters, flyers, brochures
- staff recommendations

Tips for Engaging PFAs

- Identify a specific short-term clinical improvement project, perhaps one of the HIIN topic areas, to invite a patient or family member to be an advisor.
- Create a Patient and Family Advisory Council. Typically, PFACs are broader in scope and have long-term engagement.
- Help define a beginning and ending point for the engagement (e.g., per project, term limit).
- Gain detailed feedback on a specific item or project.
- Ask a PFA to serve as a secret shopper or a “quality observer” (e.g., follow an active patient through a process to provide feedback and perspective or be a passive observer in waiting room).

Storytelling: Using Patient and Family Experiences to Drive Improvement

Quality improvement and care are driven by data and evidence-based practice. Great strides have been made in reducing harm by analyzing data and following proven best practices. Patient and family stories make the data real. Storytelling is a powerful medium for connection and deeper understanding between patients and families and hospital staff.

Ways to Share Stories

HRET’s three T’s to storytelling:

- Touch – Tell a compelling story that touches the heart.
- Teach – What are the lessons to be learned from the story?
- Tools – What are the tools needed to make change?

In addition, an effective story should focus on the following.

- descriptions versus judgments
- impact versus intent
- facts versus opinion
- personal versus emotional
- teach versus chastise
- change versus punish
- describe versus defend
- information versus repetition



Additional Resources

- [Storyteller toolkit](#) specific to patients and families
- [Tools and resources](#) to help recruit, train and work with PFAs
- [Orientation manual](#) for PFAs

References

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