How To Make Your Health System Truly Person-Centered

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The Root Cause Coalition

Speakers

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Community Catalyst

Our Mission
To organize and sustain a powerful consumer voice to ensure that all individuals and communities can influence the local, state and national decisions that affect their health.

Our History
Since 1998, Community Catalyst has worked to build a consumer health advocacy movement from the ground up.
Established in 2014, the Health Care Transformation Task Force is a multi-sector industry consortium comprised of Providers, Payers, Purchasers, and Patients committed to advancing delivery system transformation that drives rapid, measurable change for ourselves and our country.

Our members aspire to have 75% of their respective businesses operating under value-based payment arrangements by the end of 2020.
Planning: Overview

This section details key considerations for organizations that are planning new engagement strategies. Planning steps include:

• The Role of Leadership
• Building a Planning Workgroup
• Developing a Plan for Engaging Consumers
• Selecting Engagement Strategies
• Determining Resource Requirements

Planning: The Role of Leadership

Key actions:

• Openness to both organization level and self-reflection
• Establishing expectations for consumer engagement as prerequisite for decision making throughout the organization

Field Note:

All new staff at HRHCare, a Planetree designated FQHC, participate in a 2-day retreat focused on patient-centered care that features a patient panel called “Quality from the Patient’s Perspective.”

Planning: Building a Workgroup

Key actions:

• Recruiting diverse workgroup members from inside and outside the organization (planning group participants should reflect both the organization and the community it serves)
• Focusing on accessibility to promote consumer participation in meetings
• Developing training and mentoring resources for consumers designed to develop their knowledge of the organization and support active participation in planning activities
Planning: Developing A Plan

Key actions:

- Surveying existing organization consumer engagement policies and activities and performance on patient experience measures
- Gathering demographic data on the community where the organization is located and the patients it serves
- Reviewing potential engagement strategies: Communication, Consultations, Collaboration, and Co-Ownership

Best Practice:
All four engagement strategy categories can be useful, but organizations trying to walk the talk should invest in establishing collaboration and co-ownership strategies.

Planning: Selecting Strategies

Key actions:

- Interviewing staff and patients to identify the care issues of most concern
- Reviewing consumer feedback (especially negative feedback)
- Developing feedback mechanisms to ensure that consumer feedback is communicated and that consumers know what actions are being taken in response

Field Note:
Trinity Health, Children’s Mercy, and HRHCare all cited examples of using negative feedback as an opportunity to engage patients in constructive dialogue to identify ways to improve.

Planning: Resource Requirements

Key considerations:

- Staffing: A universal need for all engagement activities; however, the type and intensity of staffing demands varies with the strategy selected
- Refreshments: Providing food and drinks is a simple but essential part of successful community meetings
- Supporting Participation: Travel and parking, childcare, interpreters, and stipends/honoraria
- Recognizing Participants: Certificates of appreciation, awards for special efforts
Implementation: Overview
This section details key considerations for organizations working to put their plans for engagement into action. Implementation steps include:
- Building a Multi-Disciplinary Engagement Team
- Recruiting and Retaining Advisors
- Diversity and Inclusion Considerations
- Acting on Feedback: Closing the Loop
- Monitoring Impact

Implementation: Building a Multi-Disciplinary Engagement Team
Key actions:
- Identify a visible, well-respected point person with a connection to senior leadership
- Recruit staff members at all levels from key departments across the organization as well as several patient and community members
- Consumer members should make up at least 25 percent of the team
- Make communication every team member’s job

Field Note:
At HRHCare, the head of the Patient Experience Team, which oversees all patient engagement strategies, is a member of the executive cabinet, the highest level of the organization, where key decisions are made.

Implementation: Recruiting and Retaining Advisors
Key actions:
- Employ “low-tech” and “high-tech” strategies for recruiting consumer advisors on an ongoing basis
- Reach out to community-based organizations, including those that are led by and serve Black and Brown people
- Meaningful, important work - including projects that specifically seek to address existing health disparities
- Clear expectations; onboarding and training
- Help to overcome barriers including language barriers

Field Note:
At Children’s Mercy, new patient and family advisors receive training, written materials, and ongoing mentoring to support their success. They also work closely with new advisors to match them with the best placement within the organization.
Implementation: Diversity Considerations

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<thead>
<tr>
<th>Demographic factors</th>
<th>Non-demographic factors</th>
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<tbody>
<tr>
<td>Age</td>
<td>Medical condition/disability type</td>
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<td>Gender</td>
<td>Services used</td>
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<tr>
<td>Race/ethnicity</td>
<td>Geographic location (urban, rural, neighborhood)</td>
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<td>Language spoken</td>
<td>Local experience (e.g., immigrant background, formerly incarcerated, formerly homeless)</td>
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<td>Religion</td>
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<td>Living arrangements/three of residence</td>
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<td>Sexual orientation/gender identity</td>
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Implementation: Inclusion Considerations

Key actions:
- Meeting times that are convenient for advisors
- First names only
- No jargon
- "Open-mic" time
- Welcoming meeting space and configuration
- Sharing leadership

Implementation: Acting on Feedback: Closing the Loop

Key actions:
- Goals and a clear framework
- Clear follow-up steps
- Rationale for decisions
- Course corrections
Implementation: Monitoring Impact

Key actions:
• Process and outcome measures
• Qualitative and quantitative strategies
• Measure for diversity, equity and inclusion
• Communicate internally and externally

Scaling: Overview

This section details key considerations for organizations trying to scale engagement strategies across multiple departments, service lines, or delivery sites. Scaling steps include:
• Fostering Ongoing Culture Change
• Creating Scalable Engagement Policies
• Developing Standard Tools and Resources
• Encouraging Engagement Strategy Adoption

Scaling: Fostering Culture Change

Key actions:
• Building engagement into the organizational mission statement budgets, job descriptions, trainings, and performance evaluations
• Encourage the formation of collaborative working relationships with consumers (example: asking consumers with lived experience to provide guidance on a quality improvement project)
• Invite consumers to meetings for presentations and discussions with staff
Scaling: Engagement Policies

Key actions:
• Set clear organization level goals for implementing engagement strategies
• Balance uniformity across an organization with flexibility so that other parts of the organization can adapt policies to the needs of a specific area or patient population

Field Note: Trinity Health worked with their most experienced member hospitals to develop a Patient and Family Advisory Council toolkit. It then developed systemwide PFAC implementation goals, disseminated the toolkit, and worked to connect less experienced health systems with their more experienced peers.

Scaling: Standard Tools and Resources

Key actions:
• Review and aggregate existing engagement resources so that other parts of the organization can leverage what is already available
• Identify resource gaps and determine if they merit investment in creating new resources
• Develop an engagement strategy resource package that can serve as a starter kit for other parts of the organization

Scaling: Strategy Adoption

Key actions:
• Invite leadership and staff from areas that have yet to implement engagement strategies to attend a meeting for an already established group
• Develop highlight reel of concrete examples of successful engagement efforts and qualify their impacts on areas of interest to managers and staff (i.e. staff morale, ROI, workflow efficiencies)
• Create ongoing opportunities for shared learning across more and less experienced groups
Children’s Mercy Kansas City
DeeJo Miller
Program Manager, Patient and Family Engagement

The Region’s Pediatric Health System of Choice
- 366 beds
- 413,629 outpatient visits
- 200,825 ER/UC visits
- 15,198 admissions
- 20,144 surgeries
- 5,725 transports

* All numbers Fiscal 2018

History of Patient & Family Engagement at Children’s Mercy

Instances of Parent Advisors on committees and projects per year

Parents on staff
PFCC Policy
Culture Change

- Family

30
Parents on Staff

- 2 parents hired to work at Children's Mercy in 2008
- Currently 7 parents on staff
- Represent the perspective of patients and families
- Manage training and placing PFAs on committees & projects
- Provide on-site consultation
- Provide education to staff about patient- and family-centered care
- Oversee Patient Family Advisory Councils
- Manage PFCC curriculum for Graduate Medical Education

Current State

- Celebrated 12 years!
- Meet on-site during business hours
- 11 business meetings and one family celebration each year
- Membership led and driven
- Participate in additional volunteer opportunities
Consejo Accomplishments

• Consultation for hospital initiatives
• Educational materials for families
• Bilingual signage with universal symbols
• Community health fairs
• Spanish language radio spots
• Participation on PCORI research project
• Communication tools for inpatients

Our Journey

1999
Teen Advisory Board Started

2003
Family Advisory Board Created

2006
In-Patient Patient Family Advisory Council (PFAC) Created

2008
Family Experience Tracer Program Established

2008
El Consejo de Familias Latinas Hispanas Began

2009
Family Experience Tracer Program Created

2012
Family Centered Care Department Established

2018
PFCC Policy Implemented

2018
Hired Medical Director

2019
17 Patient Family Advisory Councils

2020
4 Parents on PFE Team

Response to COVID-19

Specific plans for and with our PFACs include:

- Created meetings canceled starting 3/16
- Infectious Disease MD
- PFE Program Manager - Parent
- Sr. Directors of Inpatient Med/Surg Nursing, Ambulatory Nursing, and Perioperative Nursing
- PFAC team very engaged in COVID-19 plans during this time and continues to spearhead communication
- Using Telehealth (FaceTime) to cover non-emergent visits to primary care and urgent care
- Encourage virtual ways to stay connected to family
- Ipad available for check-in and check-out
- Microsoft Teams available for PFAC meetings. Created PFAC Virtual Meeting Toolkit to support volunteers and staff
- Met virtually with Consejo parent leaders to collaboratively make a plan for moving to a virtual platform
- Regular weekly updates to PFAC members about Children’s Mercy updates to keep them updated and ready to provide feedback
- Ongoing collaboration with parents for COVID-19 updates. In times of fast turnaround, consult with only 2-3 PFACs
- Staying up-to-date on signage, communication, policy, website information, welcoming spaces, etc.
**Setting the Context - Useful Information**

Please note this is an emerging, rapidly evolving situation. We are regularly updating this page with key information as we receive it, but we encourage you to refer to the Centers for Disease Control and Prevention (CDC) as a reliable source for the most updated information as it becomes available, in addition to updated guidance.

**Talking to kids about COVID-19**

**Debunking myths about COVID-19**
Sample Guidelines

Key messages:
• Parents/Guardians are not visitors and may be with their children at all locations
• Restricting visitors was a difficult decision
• Safety for all is the reason

Messaging: Canceled Surgeries

Initial message created by communications staff:
Based on CDC and national guidelines, we are canceling elective cases. We will call you to reschedule once we have a better understanding of implications and restrictions are lifted.

New message created by PFE Program Staff including parent advisors:
COVID-19 (Coronavirus) will stress our healthcare system and we must conserve supplies, hospital beds, and health care providers to care for those affected. Based on CDC and national guidelines, we need to cancel surgeries that are elective and are not an emergency. We will call you to reschedule your child’s surgery as soon as it is safe. Thank you for helping us care for our community!