Patient and Family Advisory Council (PFAC) in a Box: A Quick Start-Up Guide for Practices
This “In A Box” kit is intended as a quick start guide for practices and clinics who are interested in beginning or refining their approach to Patient and Family Advisory Councils (PFACs). It is meant to be informational and a supplement to the many other materials and publications on this important topic. It is provided in the spirit of advancing work that incorporates the values, needs, and preferences of patients and those that support them into care decisions and design.

This is part of a set of tools developed to support the Voice of the Patient” initiative in the Michigan Primary Care Transormation Project (MiPCT). For more information about this guide, please contact Diane Marriott (dbechel@umich.edu).
What is a Patient and Family Advisory Council (PFAC?)

There are many articles about what PFACs do but little about what a PFAC is meant to be.

A **PFAC** is a group of patients, people who support them in their care, and practice team members who collaborate to improve care and health and more fully incorporate patient values, preferences and needs.

PFACs can help practices to:

- Get feedback on new tools, scripts, or surveys under consideration (e.g., customized survey questions, etc.)
- Help the practice to overcome challenges related to low patient response or receptivity (e.g., pre-visit lab orders being filled, etc.)
- Review practice performance information to address improvement opportunities from the patient perspective
- And so much more!
Why Patient and Family Advisory Councils are Helpful: CoDesign in Practice!

“Co-design is a process and mindset that brings together patients & families, staff & clinicians, performance improvement experts & other improvement stakeholders to design new care and service offerings or improve existing ones.”

Kaiser Permanente

When practice team members, patients, family members and caregivers come together to discuss innovation and improvement ideas it is an example of “co-design” in action.

This puts your practice “ahead of the curve” and provides an advantage and more perspectives to solve problems and plan for the future.
The IHI Co-design Method

Engage
- Establish meaningful relationships between patients, families & staff

Plan
- Develop aims & plans around how to work effectively work together

Discover
- Understand patients & staff experiences, define metrics that matter & explore opportunities for improvement

Generate Ideas

Test Ideas
- Turn your improvement ideas into action through tests of change & prototyping

Make changes stick
- Implement strategies to ensure your improvements are sustainable

Explore change ideas & decide what to prioritize
How Patient and Family Advisors Benefit Our Practice?

Role of patient and family advisors:

- Serve as sounding board for initiatives to establish balance with priorities of patients and families
- Generate new ideas to drive initiatives at all levels
- Decrease barriers to patient engagement
- Share best practices across regions
- Participate in program planning and evaluation
- Provide input on policies, programs, and practices
- Evaluate and give input on care transformation and QI activities
Characteristics of Great Patient/ Family Advisors

Look for people who can:

- Speak comfortably and with candor in public
- Focus on improvement and making things better
- Use their own care experience constructively
- See beyond their concerns and are open to issues brought up by others
- Listen and hear differing opinions
How to Recruit Members

▼ Encourage physicians, office staff and team members to identify patients with characteristics of effective advisors and invite them to join the council

▼ Ask Care Managers or Navigators in your practice to recommend patients they serve as advisors

▼ Set a goal in your team huddle to identify a set number of potential advisors by a set date; Acknowledge team members who
Best Practices to Support Members

- Convene in-person meetings where possible to build relationships
- Use social networking web-based applications
- Train advisors and “train the trainer” partners
- Provide committee members with a contact list
- Provide committee members with advisor to orient them

Remember, this type of collaboration is new for many people so preparation and orientation is important for care teams, as well as patients and family members.
Step One – Think about how your practice will support PFAC formation and operation

- Which team members will coordinate planning and communication? Which will be regular members of the PFAC?
- How can we get a standard process in place to identify items that would benefit from PFAC discussion and learning?
- Will you reimburse mileage for PFAC members, offer snacks or a dinner during meetings, etc.?
Getting Started: Preparing Your PFAC Approach as a Team, cont.

▼ Step Two – Recruit patient and family advisors

☐ Develop a one-page handout to distribute to recipients of care management and coordination services who align with advisor selection guidelines?

☐ Can your PCP reach out to invite their consideration?

☐ What expectations will you have of members (participate in quarterly meetings, etc.?)

▼ Step Three – Plan the first meeting agenda

☐ Identify practice lead for PFAC coordination

☐ Establish a charter, guidelines, etc.
Getting Started: Preparing Your PFAC Approach as a Team, cont.

▼ Step Four
  ■ Follow up with nominees and who will agree to serve
  ■ Identify preferred venue (where) and cadence (how often) for meetings
  ■ Set up process for reimbursing mileage or providing snacks or dinner during meetings (if applicable)

▼ Step Five
  ■ Identify preferred meeting times convenient for members and the practice
  ■ Invite members (by phone, email and snail mail) and follow-up

▼ Step Six
  ■ Hold initial meeting, collect outcomes and take action on recommendations from PFAC members.
Starting Off: A Sample Agenda

The MiPCT Demonstration used a PFAC at a project level

Here are examples of issues we discussed at our PFAC:

- Patient experience survey question review
- CAHPS-CG aggregate findings review
- Community Health Worker integration

All patients and family members had experience with care management servicing

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Fun, Ice-Breaking Starting Point: As a Team, Draw Your Vision of the PCMH
What We Learned Along the Way

• Starting a Patient and Family Advisory Council requires some work – and a continued commitment. If you give up too soon, you “throw the baby out with the bathwater”. The value that a council can return value to the practice builds over time.

• Use your advisors to get a sense from a patient’s perspective when your practice struggles with an area of patient engagement, or with a pattern of feedback/complaints from patients.

• Tools provided to practices should be sculpted to the beginning small practice. Often many tools are geared toward large systems or inpatient environments.
Supporting Practices for PFAC Success

▼ Are you also a CPC+ practice? PFACS are a CPC+ requirement
▼ Collect patient/practice interaction “frustration points” for a week or two
  ▼ From the practice perspective (“I don’t know why patients can’t….”; “We have done all we can”; “patient won’t comply”; etc.)
  ▼ From the patient perspective (what do you hear the most concern about from patients? What annoys them? Catch yourself saying “that is just the way we do it”, etc.)
▼ Develop a process for planning the agenda and outreach for meetings
▼ Incorporate things that advisors want to discuss
▼ Repeat again, review and improve, adjust if necessary
▼ Find early “quick win” areas that allow practices to reap benefit from patient and family input as a hook for expansion and greater adoption and let members see how their input becomes action that benefits other patients
Other PFAC Resources

▼ The AMA Steps Forward site below provides helpful material authored by Martin J. Hatlie, JD, CEO Project Patient Care and Knitasha Washington, DHA, MHA, FACHE, Executive Director, Consumers Advancing Patient Safety


▼ The Institute for Patient and Family-Centered Care (www.ipfcc.org) also has helpful information about PFAC formation and operation.

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