

2014

STARTING AND SUSTAINING A PATIENT ADVISORY BOARD

Patient Liaison Handbook

GUIDE FOR CLINIC STAFF ON RECRUITING, TRAINING
AND ENGAGING PATIENTS TO SERVE AS PATIENT
ADVISORS ON A PATIENT ADVISORY BOARD



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Why Utilize Patient Advisory Boards?

One way to begin the process of advancing patient centered care is by involving patients and families in the design of care. At San Francisco General's Family Health Center we do this with the help of the Patient Advisory Boards (PAB).

The purpose of a Patient Advisory Board is for patients to provide their unique and invaluable perspective to clinic management, staff, and providers about how to make improvements, with the goal of better serving all clinic patients.



The Mission of San Francisco General Hospital:

San Francisco General Hospital Mission Statement:

To provide quality healthcare and trauma services with compassion and respect.

The Mission of the Family Health Center:

The Family Health Center's mission is to provide the highest quality *primary and preventive care to children, adults, and pregnant women, regardless of ability to pay*



We value:

- Providing care that is compassionate, accessible, efficient, culturally sensitive and in the patient's language;
- Celebrating all aspects of our diversity and that of our patients, and embracing the broadest possible definition of family;
- Providing leadership through our teaching programs, our exploration of new ideas, and our advocacy; and
- Collaborating to make our work gratifying and our work place welcoming and safe.

Mission of the FHC Patient Advisory Board

- Patients will be active participants in the decision making process both about their own health care and clinic operations
- The PABs will serve as an avenue for hearing what the patient needs are as well as allow for an exchange of ideas and input on new and ongoing projects
- The PABs will promote partnering with patients and working as interdisciplinary teams
- The FHC will engage patients in short and long term quality improvement initiatives in partnership with clinic faculty, residents, and staff.

Who makes up The Patient Advisory Board?

Patient Advisory Board members are committed volunteers, comprised of patients, their family members, and caregivers. Advisors help promote patient-centered care within their primary care clinic. Serving as key advisors, they inform clinic leadership on those issues that are most important to patients and family members.

Advisors work in partnership with health care providers to:

- Strengthen communication and **collaboration** among patients, families, caregivers, and staff
- Promote patient and family support and involvement
- Propose and participate in building **sustainable** patient care programs and services
- Focus on hospital and clinic needs

An advisory board advises. They don't:

- Mandate Policy
- Authorize programs or procedures
- Advocate for special groups
- Provide financial aid





Patient Advisor: Roles and Responsibilities

Definition of a Patient Advisor: a patient or family member of a patient at your clinic who provides their unique and invaluable perspective to clinic management, staff, and providers, about how to make improvements, with the goal of better serving all clinic patients.

Purpose: The PAB serves as an advisory resource for current and future projects on improving the patient experience. This is a venue for input and method of communication, which promotes collaboration between patients and providers.

Patient Advisor Responsibilities: Members must attend each meeting, or notify the Patient Liaison ahead of time with the reason they cannot attend. Members must be respectful of other members' opinions, time, and confidentiality.

Time Commitment: Patient Advisors meet monthly as part of the Patient Advisory Board. This position is a 6-month to 1-year commitment. Patients may also contact the Patient Liaison about serving on shorter-term informal panels concerning various topics.

Opportunities for Involvement: In addition to the PAB monthly meetings, it is our goal to engage members in Quality Improvement Projects with other clinic staff.

Volunteer Position: A Patient Advisor is a volunteer position. However, small gestures to show appreciation of members' time and effort, such as gift cards, can go a long way in serving as incentives. Encourage members to go through your hospital's official volunteer process for additional incentives and opportunities to serve.

Qualities of a Patient Advisor

- **Representation**
 - Diverse Board Members
 - It is important that the Patient Advisory Board is indeed representative of the patients and families served by your clinic
 - The Patient Advisory Board should look like your waiting room
 - A balance of new and old members should also be reached
- **Personal Attributes/Attitudes of an Advisor**
 - Adept at sharing insights and information about their experiences in ways that others can learn from them
 - Able to see beyond their own experiences
 - Concerned about more than one issue or agenda
 - Able to listen and hear differing opinions
 - Works in partnership with others
 - Interacts well with different kinds of people
 - Listens well





Patient Liaison: Roles & Responsibilities

Definition of a Patient Liaison: The Patient Liaison is a volunteer or staff person who coordinates the involvement of patient and family advisors. The Patient Liaison works with advisors, staff, and providers to facilitate, monitor and ensure successful collaboration as well as keep track of the progress being made on the different projects that the Patient Advisors are part of in the clinic.

Specific Responsibilities:

- Coordinates the recruitment, selection, and ongoing support of patient and family advisors
- Ensures that advisors are oriented and prepared to fully participate on advisory councils, quality improvement teams, and related activities
- Prepares staff and physicians for working collaboratively with advisors
- Encourages the participation of patients and family advisors, debriefing them after meetings as needed (or assigns another staff member to be mentors for specific advisors)
- Ensures that advisors have advance notice for meetings and the agendas as well as other information and resources they need to be successful participants
- Assists in tracking the impact of involvement of patient and family advisors

Broader Responsibilities:

- Knows the culture and organization of the clinic and its staff
- Is knowledgeable about the decision-making processes
- Knows formal and informal leaders of the clinic
- Is alert for strategic opportunities to introduce/integrate patients and family centered concepts into new or ongoing initiatives which might include:
 - Resident Quality Improvement Meetings
 - All staff Meetings
 - Team Meetings
 - Provider Meetings

Qualities of a Patient Liaison

- Patience and perseverance
- Flexibility
- Excellent listening skills
- Openness to new ideas and ways of working
- Willingness to learn
- Ability to work positively and proactively
- Ability to see strengths in all people in all situations and be able to build on these strengths



Recruitment Tools

Patient Advisor recruitment should be an ongoing process as many Advisors may depart at the end of their commitment period as well as throughout the year due to illness, family commitments, or other work.

Open Recruitment: Broad efforts to recruit new patient advisors can take many forms, including but not limited to:

- Flyers: displayed in public areas of the clinic
- Brochures: distributed and displayed in the waiting room
- Videos: Using testimonials of current advisors describing their experiences serving on the board
- Word of Mouth: involvement can be suggested through clerks and other patients

A Sample Flyer



Become A Patient Advisor!



What is the Patient Advisory Board?
Patients, family members, and caregivers will meet once a month to share experiences. Your opinions will be anonymous and help improve GMC.

Who Makes a Good Patient Advisor?

- Someone willing to share opinions on his/her patient experience
- Someone who can listen and hear different opinions
- Someone who works in partnership with others
- Someone who listens well
- Someone who interacts well with other people



What's in it For You?

- \$5 Gift Card at each meeting
- Refreshments provided at each meeting
- Certificate of Thanks
- Sense of accomplishment for taking part in improving the quality of your healthcare!





To learn more about the Patient Advisory Board come to an Information Session
January 11th: 2:30 - 3:30 PM
Room 7E2

A Sample Brochure



Advisory Board Meeting

Meetings are the
Last Thursday of the
Month
From 3:30 - 5:00pm

If Interested Contact:
Julia at
Julia.Ruffo@sfdph.org

Make a Difference!
Become a Patient
Advisor



General Medicine Clinic, 1M
San Francisco General Hospital
1001 Potrero Ave.
San Francisco, CA 94110

The General Medicine Clinic Patient Advisory Board

Patients and Caregivers coming
together to help improve the
General Medicine Clinic



General Medicine Clinic

The Mission of GMC is to
Provide:

Access to Care: GMC provides for
San Francisco residents, regardless
of their health status, insurance
status, immigration status, or
ability to pay. We are located at
San Francisco General Hospital
and have close relationships with
specialty clinics.

Quality Care: GMC is committed
to giving the highest quality of care
for our patients.

Excellence in training: GMC is
committed to having the best
teaching environment possible for
medical, nursing, nurse practitioner
and pharmacy residents and
students.



The Patient Advisory Board at the Family Health Center

The Patient Advisory Board

Purpose: The Patient Advisory Board works on
projects to improve patients' experiences in the
General Medicine Clinic. This will give
patients, family members and caregivers the
opportunity to make a difference.

Patient Advisor Opportunities: As a patient
advisor you have the opportunity to be on the
front lines of change and improvement at GMC.
Representing patients, family members, and
caregivers we will work on projects like:

- Updating the waiting room
- Making patient education materials
better
- Improving telephone access
- Advice on new GMC policies

All you need to be a Patient Advisor
is...

1. To be a patient, family member,
or caregiver of the General
Medicine Clinic.
2. The commitment to work in
partnership with others to make
improvements.
3. To attend monthly meetings and
advocate as a representative for
the patients of the clinic for the
next 6 months to 1 year.

Targeted Recruitment: Because it is important to look for certain qualities in patient advisors, one of the best methods for recruitment includes personal referrals by providers or other clinic staff.

- Orient your team by asking them:
 - Why do you think it is important to have patients' input on projects?
 - What issues do you think are most important to patients?
 - Who do you think makes the best Patient Advisor?
- Let providers/staff know to be on the lookout for potential advisors using:
 - Announcements at provider and staff meetings
 - Emails
 - These announcements/emails should emphasize
 - The qualities your team should be looking for in an ideal advisor
 - Ways your team can help with recruitment
 - Ask providers to pass on the contact information of their referrals





Sample Email: sent to providers for Patient Advisory recruitment (can be modified for other clinic staff i.e. nutritionist, social worker, health worker, or health coaches):

Dear Providers,

We would like to invite you to be part of the recruiting process for new patient advisors at (your clinic). Patient Advisors meet monthly to give direct input on clinic policies, programs and or practices to improve care and services.

Qualities you many look for in potential Patient Advisors:

- Comfortable speaking in a group with candor
- Able to use personal experiences constructively
- Able to see beyond their own experiences
- Concerned about more than one issue or agenda
- Able to listen and hear differing opinions
- Have expressed a general interest in getting involved with the clinic or specific interest in serving as an advisor

If you can think of any patients who would be appropriate for this role, please reply with their name, contact information and/or MRN to [\(your email\)](#). Although at the moment we are focusing our recruitment to English speaking patients and caregivers, we are also open to receiving names of Spanish speaking patients who you feel would be great in this role as Patient Advisors.

Please feel free to contact me if you have any questions or concerns.

Thank you!

(Your Name and contact information)



Sample Recruitment Card: to place in provider and staff mailboxes or pass out during provider or staff/team meetings for them to recommend patients to be part of the Patient Advisory Board.

(Clinic Name) is looking for NEW Patient Advisors!

Patient Advisors serve as representatives of the patients at (your clinic) and help give direct input on policies, programs, and or practices that affect the care and services that they receive. Help us by recommending patients and family members for the Patient Advisory Board!

Qualities you may look for in potential Patient Advisors:

- Expressed interest in clinic involvement and/or serving as advisor
- Comfortable speaking in a group
- Able to use personal experiences constructively
- Able to see beyond their own experiences
- Concerned about more than one issue or agenda
- Able to listen and hear differing opinions

Please list any Patients (name and MRN) you feel might do well in this role:

1. _____
2. _____
3. _____

Recommended by: _____

(The patient you name is in no way committed by your recommendation. I will be contacting them to inform them about the board and gauge their interest in participating)

Please return to: (Your Name) or you can email me with their info at (your email)

THANK YOU!



Information Session

Who to Invite:

- Formulate a list of potential advisors from those patients/family members who have contacted you (open recruitment) and those suggested by providers (targeted recruitment)
- Send letters/emails and call those on your list
 - Initial calls/emails
 - Gauge interest level in learning more about the PAB
 - Invite those interested to an informational session
 - It is advisable to send letters ~ 1 ½ - 2 weeks before the session, call prospective Patient Advisors at least 1 week in advance, and then give a reminder call a day or two before.

Information Session Content

(Refer to pages 3-7 for specific useful content)

- What is the Patient Advisory Board
- Who is the Patient Advisor
 - Roles
 - Responsibilities
 - Opportunities
 - Commitments
- Confidentiality/HIPPA
- Questions
 - Address/answer any questions, comments, or concerns.

Patient Advisor Applications

- Following the meeting hand out applications so those interested in becoming patient advisors can fill them out and give them back to you.

Patient Advisor Interview

- Ask those who fill out an application if they have time to stay for a quick interview. If not, call them to come in at another time.



Patient Advisor Outreach

Sample Phone Invitation Script:

Patient Advisor Recruitment: Informational Meeting Invitation

Hello my name is _____ and I am calling from the (clinic name) at (hospital name). Would it be possible for me to have a few minutes of your time?

No: Is there a better time when I could reach you?

Yes: I am calling because you were recommended by your provider _____, as someone who might be a good candidate to be part of the Patient Advisory board here at the (clinic name).

Have you heard of the Patient Advisory Board?

It is made up of a group of patients who meet once a month (list exact meeting time) to give input on current projects the clinic is working on as well as provide suggestions on how we can better improve the service we provide as a clinic.

We want to invite you to an informational meeting where we will talk about what the Patient Advisory Board is and what it means to be a Patient Advisor. We can give you a parking pass if you need one as well as a Safeway gift card in appreciation of your time.

Do you think this is something you might be interested in?

No: No problem, Thank you for your time. Have a great day!

Yes: Great! We will be meeting (_____). You can call me at (contact number) or reach me through email at (your email) if you have any questions.

Thank you and I look forward to meeting you on the (repeat time and date again)!

Sample Letter:

June 6, 2011

Dear (patient's name):

I am the **(your position)** and I am writing to you because your provider, **(list referring provider)** has recommended you as a potential candidate to be a part of the clinic's Patient Advisory Board. We feel that patients have a say in what goes on at the **(clinic name)** and we need your help to strengthen the voice of the Patient Advisory Board.

There is a flyer included with this letter explaining the Patient Advisory Board. We will be having an informational meeting on **(Time and Date of Meeting)** to talk about the Patient Advisory Board and what it means to be a Patient Advisor. We hope that you can join us on **(list date again)** to get more information and see if this is something that you want to be a part of. Refreshments will be provided and you will receive a \$10 Safeway gift-card in appreciation of your time.

Where: Meeting location, including address and room as explicitly as possible

When: Day of the week and date

Time: Both start and ending times of the meeting

Please feel free to call me with any concerns or questions at **(your number)**.

Sincerely,

(Your Name and Contact Information)



Patient Advisor Application

Date:

Please print:

Name: _____ Date of Birth: _____
(Last) (First) (MI)

Address: _____

City: _____ State: _____ Zip Code: _____

Home Phone: (____) _____ Cellular phone: (____) _____

Work Phone: (____) _____ Fax: (____) _____

E-mail address: _____

Language(s) you speak: _____

Health Issues of Interest: _____

Will you allow your contact information to be shared with other advisory board members?

☐ Yes ☐ No

I am: ☐ Clinic Patient ☐ Family member of a Clinic Patient

I first started coming to the Clinic in: (year) _____

Clinic Team: _____ Primary Care Provider: _____

What times are you able to attend meetings/events: (check all that apply):

☐ Mornings ☐ Afternoons ☐ Evenings

What days of the weeks are best for you? (Check all that apply):

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday

Commitment Interest:

☐ I am interested in a **6 month** commitment to the patient Advisory Board.

☐ I am interested in a **1 year** commitment to the patient Advisory Board.

☐ I am interested in participating in a short-term project or panel.

Signature: _____ Interviewer(s): _____



Interview

Interview Guide:

Introduction

- Introduce yourself and anyone else present to the patient/family member/caregiver

Information

- Purpose of meeting and application process
- Background on SFGH, GMC, and Advisory Board
- Goals
- (Info only needed if interview does not immediately follow an information session)
- Example Projects

Ask if interviewee has any questions so far? Check for understanding!

Possible questions for a Prospective Advisor:

- What is your experience working in a group before?
- Why are you interested in the Patient Advisory Board?
- What do you hope to get from being a part of this Board?
- In your opinion what area of the clinic is in the most need of improvement?
- Our aim is to gather a diversity of viewpoints... How do you feel and or respond when someone has a different opinion from you?
- Would you be willing to share your/your family member's personal story?

Assessment (Following Interview):

- Determine whether patient/family member is a good fit for this advisory board or whether they might be better utilized on a different project
- Assessment should be based on those qualities which make an ideal board member (see page 7)
- Time commitment and logistics should also be taken into consideration

What if person is not the right fit for this advisory board?

- Review applicant's skills and attributes
- Is there another appropriate advisory role?
- Keep applicant's name on file
- Be clear and honest with applicant



Patient Advisory Board Orientation/First Board Meeting

Once a patient or family member decides to be part of the Patient Advisory Board, we want to continue developing a sense of belonging, as well creating time for bonding with other Patient Advisors. The 1st PAB meeting advisors attend will also serve as an orientation on general rules (bylaws) of the group operation, serving as a time to include members in developing ground rules which the group agrees to abide by.

Sample Orientation:

Orientation Agenda
June 28, 2011
3:00pm-4:30pm

- | | | |
|------|--|-------------|
| I. | Welcome and Announcements
(Food and Mingling) | 3:00-3:15pm |
| II. | Introductions (Giving out of Name Tags) | 3:15-3:40pm |
| | A. Ice- Breakers | |
| | 1. What do you hope to contribute to this group? | |
| | 2. What are you hoping to gain? | |
| | 3. Share something interesting about yourself? Skills or Talents? | |
| III. | Go over Bylaws and Create Ground Rules | 3:15-3:50pm |
| IV. | Updates / Introduce Current Projects | 3:50-4:10pm |
| | A. LDL sheet | |
| | B. Comment Boxes | |
| V. | Media Release | 4:10-4:20pm |
| VI. | Evaluation/questions/comments | 4:20-4:30pm |
| | A. Debrief Questions | |
| | 1. What went well at today's meeting? | |
| | 2. What are some things that could have gone better? | |
| | 3. What changes or suggestions do you have to improve the meeting? | |

Mandatory Yearly Orientation Refresher

All Patient Advisors must go through some initial training to better understand their role in the clinic. The first meeting may serve this purpose. For new additions to the board a mandatory orientation will be offered once a year. This may be used to work on team building and meeting efficiency.

Topics to be discussed may include: communication and facilitation skills, meeting process, HIPPA refreshers, review of roles/responsibilities.





Agenda

Setting the Agenda: Coming to the meeting prepared is of vital importance. Setting the Agenda at least one week before the meeting date is ideal in order to be prepared as well as be able to give advance notice to the Patient Advisors of the agenda items being discussed that month.

Sample Agenda:

Meeting Date
Meeting Time
Meeting Location

Clinic Patient Advisory Board Agenda

Facilitator: Name of Patient Liaison

Co-Facilitator: Someone representing clinic management

- | | | |
|------|--|--------------|
| I. | Sign-in/Help yourself to food | 2:30-2:40 PM |
| II. | Ice Breaker | 2:40-3:00 PM |
| III. | Update on Suggested Projects | 3:00-3:20 PM |
| IV. | Ask for Feedback on Issues Raised by Clinic Staff/Management | 3:20-4:00 PM |

Our Next Meeting is ... (next meeting time, date, and location)

From 1 to 10 how did we do today?



1 2 3 4 5 6 7 8 9 10





Meeting Minutes

Meeting minutes are an excellent communication tool to keep clinic management informed on what is being accomplished at meetings. By circulating meeting minutes it is possible to directly bring patients' feedback to the clinic team. Meeting minutes also serve to update those board members who were unable to make a meeting.

Sample Meeting Minutes: (Topic, Discussion Notes, Next Actions)

Patient Advisory Board		Meeting Minutes	Date/Time: Tuesday, February 25 th , 1:30-3:00 pm
Present: Judith Burns, Tomiko Morris, Les Kromer, Kenneth Janes, Vee Chhith, Laura Pullen, Lucia Angel, Minna Abdel-Wahab, Faustine Dufka Next Meeting: Tuesday, March 25 th , 1:30-3:00 pm, Building 80, 5 th floor conference			
TOPIC	Discussion	NEXT ACTIONS	
1 Welcome/Announcements	<ul style="list-style-type: none"> Free computer classes at SFGH Library, Building 30, First Floor: March 12, 19, and 26, 3:00-4:30 pm 3 classes: 1) Typing; 2) Gmail; 3) Google drive → Open to patients and anyone in the community March 18: first meeting for teen advisory board Happy early birthday Judith! Lucia's correct email is angel@fcm.ucsf.edu 	<ul style="list-style-type: none"> Call to register for computer classes: 206-3114 Reminder about voter registration questions from Dr. Chen 	
2 Provider Voicemail vs. Centralized Voicemail	<ul style="list-style-type: none"> Issue is that residents don't always have time to check or return voicemails. Faculty schedules are more predictable so it's less of an issue for them. Suggestions: centralized line to leave voicemail messages for residents. Designated person will check voicemails and make distinction between urgent vs. non-urgent calls. Some patients also call the NP or the triage nurse at 206-8609 	<ul style="list-style-type: none"> Find out how many voicemails residents are getting per week 	
3 Big Aims: LDL and Mammography	<ul style="list-style-type: none"> Statewide initiative to increase number of mammogram screens → Extended hours at Avon Center: weekend hours and limited evening hours, latest appointment should be 7:30 pm because there are safety concerns. 	<ul style="list-style-type: none"> 	
4 Hearts Grants	<ul style="list-style-type: none"> <u>Newsletter group</u>: Les has volunteered to take over while David is recovering from his surgery. <u>Chair group</u>: 35 blue chairs have been ordered; we are just waiting for them to be delivered. <u>Calendar group</u>: We can present the calendar template at the monthly provider meeting for feedback from providers. Leftover money from newsletter can go towards the calendar printing costs (same printing company). 	<ul style="list-style-type: none"> <u>Newsletter group</u>: Send articles to Les by March 7. Ask Dr. McKinney to write an article? Check with Jane about topic of interview. <u>Chair group</u>: N/A <u>Calendar group</u>: Meeting to finalize resource list is Thursday, March 6th at 9:30 am. Meet in front of Laura's office. 	
5 Therapeutic Food Pantry	<ul style="list-style-type: none"> Dr. Nguyen has gotten the green light from SFGH CEO Sue Currin to move forward with research and fundraising. 	<ul style="list-style-type: none"> Email Dr. Nguyen if you have any ideas/suggestions about this project, or if you are interested in joining the Fundraising Subcommittee or Research Subcommittee. rita.nguyen@ucsf.edu 	
6 Care Management Team	<ul style="list-style-type: none"> Goal is to help coordinate care for certain patients with several medical problems Long-term project Feedback about brochure: less text, remove quotation marks around We Care About You 	<ul style="list-style-type: none"> 	
7 Planning for the Year Ahead	<ul style="list-style-type: none"> One-on-one meetings with Laura, Lucia, or Minna will take place in March 	<ul style="list-style-type: none"> Laura, Lucia, or Minna will contact you to schedule your meeting at a time that is most convenient for you Plan PAB retreat after interviews have been conducted 	
Parking lot items (for future discussion; not key to goal of this meeting)			
Connecting with grounds supervisor to talk about memory plants in comfort garden → discuss when Jane and Armando are present			
Still pending: prior authorization process			



Patient Advisory Board Member Meeting Feedback

Name (optional): _____

Meeting: _____

Date: _____

Using the following scale, please rate your response to the following statements. Your honest response will help us ensure meaningful involvement of council members. Feel free to make additional comments below.

1	2	3	4	5
Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree

- | | | | | | |
|---|---|---|---|---|---|
| 1. I understood the purpose of the meeting activity. | 1 | 2 | 3 | 4 | 5 |
| 2. I received enough information ahead of time. | 1 | 2 | 3 | 4 | 5 |
| 3. I felt adequately prepared for the meeting/activity. | 1 | 2 | 3 | 4 | 5 |
| 4. The agenda was well organized. | 1 | 2 | 3 | 4 | 5 |
| 5. I felt welcomed and included as a member of the group. | 1 | 2 | 3 | 4 | 5 |
| 6. Opinion was respected. | 1 | 2 | 3 | 4 | 5 |
| 7. I am clear about what was accomplished. | 1 | 2 | 3 | 4 | 5 |
| 8. My participation was worthwhile. | 1 | 2 | 3 | 4 | 5 |

Comments:

☐ I would like a call to follow up on the meeting/activity

Phone# _____

The best time to reach me _____



Patient Advisory Board Monthly Checklist

- ☐ Create Agenda
- ☐ Confirm Room/Location
- ☐ Check in with any guest or presenter and orient them to the group
- ☐ Make pre-meeting reminder phone calls (or designate person for the month and remind them about important info that we want them to tell participants)
- ☐ Print Agendas and any relevant documents for the meeting
- ☐ Gather and check any necessary meeting technology (projector etc.)
- ☐ Print Sign-In Sheet and way finding signage
- ☐ Buy and Prepare Meeting Refreshments
- ☐ Bring Gift Cards and extra pens
- ☐ Make post-meeting calls to absent members
 - Check-in see how they are doing let them know what they missed at the meeting
 - Update on meeting info
- ☐ Type minutes and send to group

Meeting Facilitation Guide

Create Welcoming Environment

- Be there 20 minutes early to greet board members and set up any equipment
- Introduce people to yourself and each other

Be Prepared

- Have all materials ready (food, incentives, sign-in sheet, name tags, and agenda)

Manage Conversations

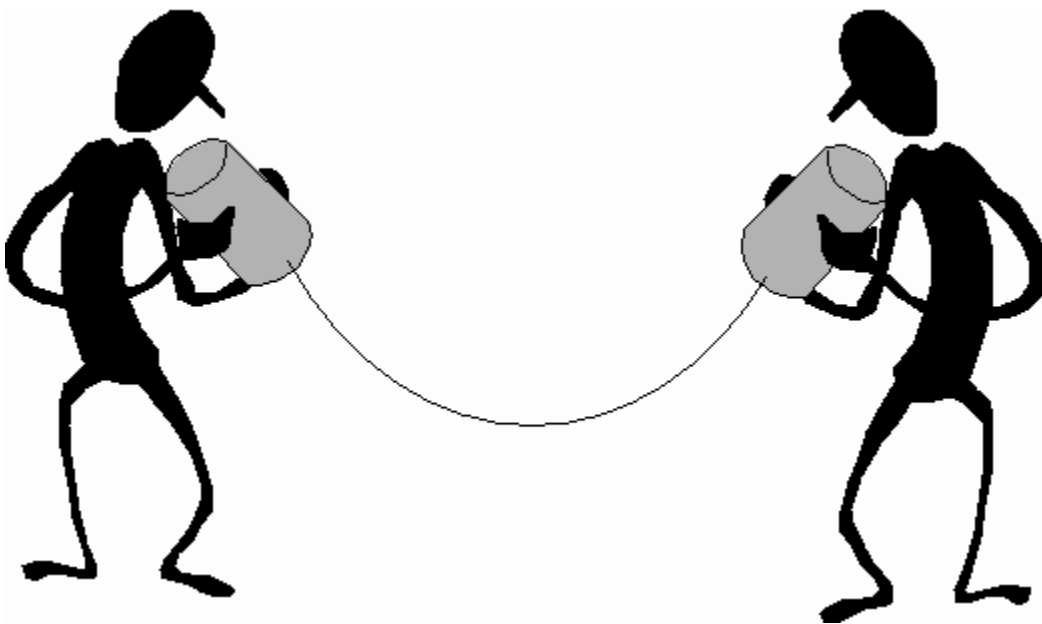
- Manage time effectively
- Manage participants seeking to dominate the conversation– paraphrase comments, use flip charts to summarize ideas, and redirect conversation by asking others for new ideas /perspectives
- If topic veers off of agenda try to gain group’s consensus
“Although it was not originally on our agenda for today, everyone is interested in talking about..... Is this something you want to make time for, postponing one of our other topics till next time?”
- Use small groups and report out to encourage participation
- Manage ramblers – find tactful and polite ways to interrupt, summarize, and ask for another’s input and/or suggestions.
 - The use of closed questions can be helpful

Manage Tasks/Keep Group Focused

- Stay focused on topics of agenda while being flexible to the mood of the group
- Decision making
 - Use small groups to brainstorm
 - Review each group’s ideas
 - Combine like/similar items before voting
 - Ask people to vote for top choices (top 2-4)
 - Prioritization – give colored dots with initials
 - Manage personal agendas
 - Manage personal assumptions/judgments
 - Evaluate the meeting effectiveness

Relationship Building and Engagement of Patient Advisors

Once patients have been recruited and have agreed and committed to be a part of the Patient Advisory Board, the REAL work begins. Building relationships is one of the most important things we can do as Patient Liaisons. Keep patients engaged in the work the group is doing as well as the individual projects Patient Advisor might have taken on. We try to maintain constant communication before and after the monthly PAB meetings as well as throughout the month.



Patient Advisor Ownership of Monthly Meetings

At first the group will require a lot of guidance on meeting structure and flow; it is our goal for the group to take ownership and responsibility for the meeting by becoming facilitators, note takers and timekeepers. This can also help keep members engaged during the meetings.



Guests and Presenters at the Patient Advisory Board Meetings

We encourage having guests and speakers at the Patient Advisory Board meetings. To make the most of these encounters, it is important that speakers are prepared, and know what they can expect and ask from the group, as well as how to make their time at the meeting most effective. Please use the *Patient Advisory Board Speaker Checklist (shown below)* to help prepare speakers.

PATIENT ADVISORY BOARD SPEAKER CHECKLIST

Thank you for agreeing to present at our patient advisory board meeting. By working in partnership with the advisory board, staff can secure insights and ideas from patients, family members, and caregivers about how to improve care processes in our clinic. To help you prepare for the meeting, this form gives you some background information about the advisory board. We hope you find this and the checklist below helpful in your preparation for our discussion.

Our clinic believes it is essential that Patients are active participants in the decision making process of the health care they receive. Our Patient Advisory Board provides the needed avenue for hearing patients' needs. It is also a place for an open exchange of ideas and input on new and ongoing projects at the clinic that encourage partnering with patients and working as an interdisciplinary team.

Your information will be most helpful to us if you:

- ☐ Provide a brief introduction (or context) to what you are working on. (Give background or define key terms)
- ☐ Come prepared with ideas of what patient advisors can provide to you or your initiative.
- ☐ Define the questions you would like to have answered by the patient advisors. (We encourage you to be as specific as possible)
- ☐ Listen to questions and concerns from the council members.
- ☐ Focus on current issues.
- ☐ Are prepared to share ideas about follow-up (such as a return visit or timeline for progress report.)

Thank you for taking the time to get input and for sharing your expertise with us!

Further Opportunities for Advisor Involvement



Involve Advisors in other Quality Improvement Projects

In addition to hearing from the patients, family members, and caregivers during the monthly meetings, our goal is to engage them in QI projects with other clinic staff. Feeling a sense of ownership of a project will help the patient advisor feel engaged and part of the group on a deeper level. Because this requires a slightly higher level of commitment, not all advisors will be able to take on long-term projects. However, encouraging them to be part of other smaller projects is also a good idea.

Prepare Advisors for Effective Involvement in Meetings and Presentations

Suggestions and contributions made by Patient Advisors can be made more effective by preparing and informing the advisor about the purpose and goal of the committee or project they will be participating in. For that reason, it is of great importance that we as patient liaisons ensure that the patient is knowledgeable about the background of the project and knows as much information as possible about the goals of the meeting and their purpose for attendance and participation.

It is advised that you have an initial meeting with the advisor before the first project meeting where all pertinent information regarding the project can be shared. This means YOU as a patient liaison must be well informed and prepared to answer questions the advisor might have going into the meeting.



Important things to consider and address in the pre-meetings are:

- ☐ Who will be taking part in the meeting? What are their roles and responsibilities?
- ☐ What is the purpose of the meeting?
- ☐ What specific goal do we wish to accomplish from meeting together?
- ☐ What do we want to learn from the Patient Advisors?
- ☐ Do we want input limited to a certain topic or do we want general experiences?
- ☐ Is there a time limit? (Encourage staying within time given)
- ☐ Encourage patients and families to be as positive as possible and provide “constructive criticism” and address ways to distinguish between helpful and unhelpful practices.
- ☐ Ask patients to avoid using names of specific staff/physicians/patients
- ☐ Help patients prepare for unexpected emotions by suggesting ways to handle emotions as they arise when speaking.

Logistics

- ☐ Where and what time will this meeting take place?
- ☐ Will a gift card or stipend be awarded?
- ☐ Will travel/childcare be reimbursed?

How to Select Advisors to Make Presentations/Attend Meetings

- ☐ Select patients with relevant experience / expertise / perspective
- ☐ Has ability to share personal experiences in a way that others can learn
- ☐ Plan for diversity when possible
- ☐ Avoid patients who are angry or only focused on one issue or aspect of their experience

Meeting Follow up and Debrief

- ☐ Call Advisors soon after their presentations or meeting attendance
 - Thank the patient advisor for their presentation or meeting attendance
 - Offer feedback and constructive suggestions
 - Offer to discuss any emotions that surfaced as a result of sharing their experiences
 - Provide them with a way to evaluate their participation and to share ideas for improving the presentation or meeting process.
- ☐ Offer staff and providers ways to evaluate the presentation or meeting and provide ideas for improvement.



Tracking Quality Improvement Projects and Patient Advisory Board Contributions

Quality Improvement Projects

- Keep an active list of Quality Improvement Projects
 - List should be classified by Accomplished, In Progress, To Do
- Board members should be updated frequently on the status of these projects, including their contribution to moving them forward.
- Suggested projects should be brought to the attention of clinic management, and followed-up carried out by patient liaison.

Patient Advisory Board Participation and Contribution

- Advisor participation in project meetings should be tracked
- Data should be collected on effect of advisor participation
- Effects of advisor contribution should be brought to the attention of clinic

Celebrate Progress

- Make sure to celebrate progress of projects due to collaboration both within the Patient Advisory Board and in the clinic.

Information to Track

- Project Name
- Advisor Involved as well as his/her role and activities
- Time spent on project
- Clinical areas, or as appropriate, diagnosis, that patient/family member represented
- Staff involved in collaborative endeavors. May want to keep a list of disciplines as well.
- Issues addressed, products developed, classes taught, peer support programs coordinated, and other activities. (Describe and keep examples of the issues, materials and activities.)

Develop an Annual Report to share the story and profile benefits of collaboration.

Reports should include:

- Project Name
- Patient and Family Advisors involved as well as their roles and activities.
- Time spent on project
- The names of the specific advisors who helped
- Clinical areas, or as appropriate, diagnosis, that the patient and families represented
- Staff involved in collaborative endeavors. May want to keep a list by disciplines as well.
- Issues addressed, products developed, classes taught, peer support programs coordinated, and other activities- describe and keep examples of the issues, materials and activities.



Patient Advisor Appreciation

Letting Patient Advisors know that the clinic values the work that they do for the clinic is an important part of validating and supporting advisors in their role. There are some tangible ways to try to show this:

Gift Cards

We give our Patient Advisors \$10 Gift cards (from Safeway/Walgreens/Target) for each meeting that they attend, including any additional meetings or events they might come to (i.e. Provider Meeting) where they are representing the Patient Advisory Board.



Certificates

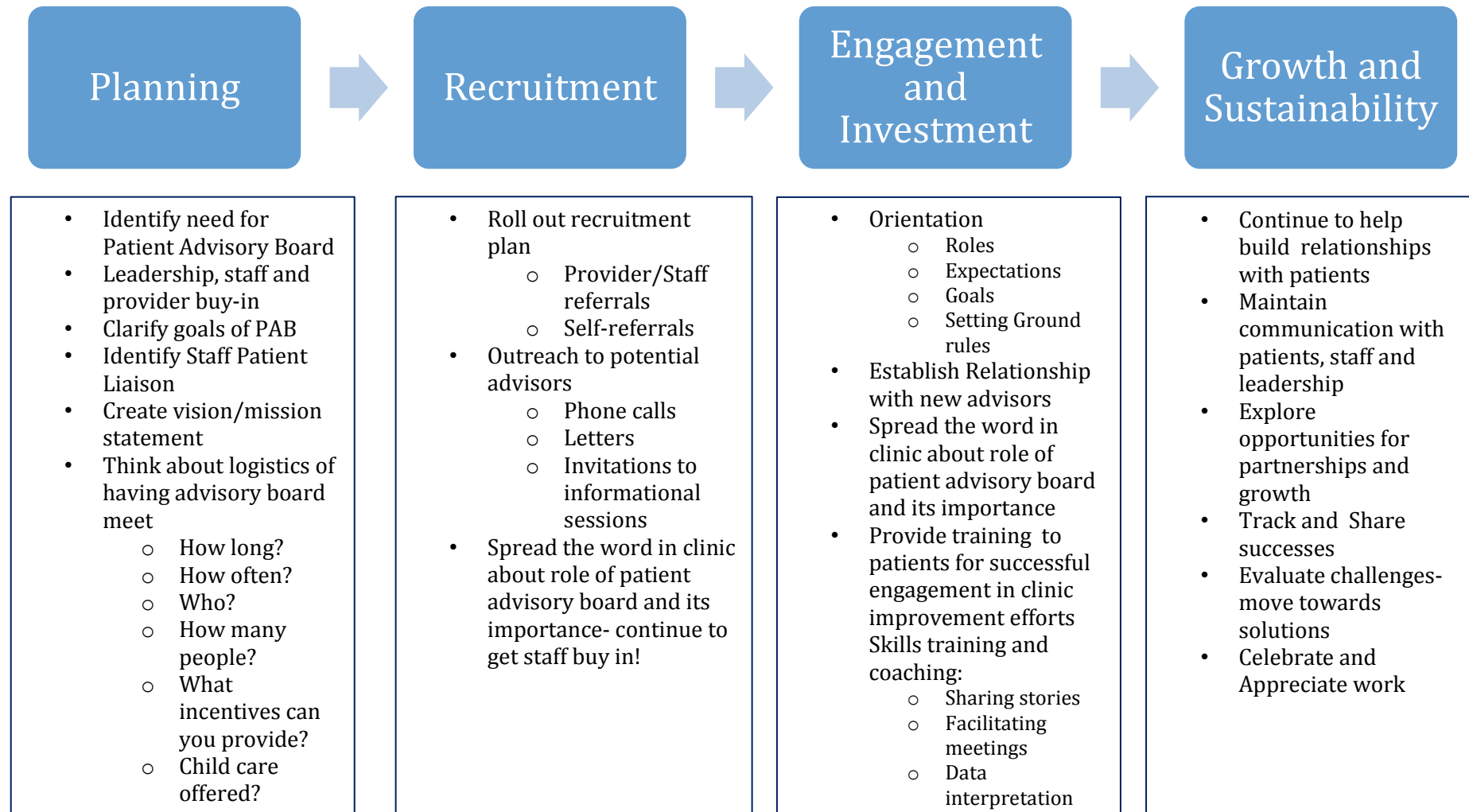
Giving out certificates for Events such as the one year anniversary of the group can be a great way to boost group morale and can serve as a way of acknowledging and appreciating participant's commitment, time and effort to the group and clinic.



Showcase Patient Advisory Board Accomplishments

Having a reminder of the different projects that the PAB members have been a part of is important. It is a way for the group to be reminded of their accomplishments, as well as serving as a tool for others to see the work of the group. This can be done in a binder or photo album that captures projects and Patient Advisors in action.

Building an Advisory Board: Toolkit



Additional Resources

If you have any questions or would like additional information please feel free to contact:

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