**Bon Secours Virginia**

**Patient & Family Council Implementation Guide**

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# Council Objective

**Why Host a Patient Family Engagement Council (PFEC)?**

The purpose of the PFEC is to provide a forum for improved information sharing between patients, providers and staff. The concept was piloted at Patterson Avenue Family Practice over a twelve month period as the Capstone project developed by the Evolve Clinical Operations team for presentation at the Medical Society of Virginia’s collaborative on February 13, 2015. The PFEC is a way to capture the voice of the customer and hopefully advance patient centeredness in Medical Home practices with positive impact on the provision of care.

# Getting Started

**How do I start a PFEC in my Practice?**

You begin by discussing the PFEC concept with one of the Physician Champions or the Physician Lead for the Patient Family Engagement Council Project. If you agree to participate and form a council at your practice you will be provided a project team to assist you with logistics. The team will explain your role and the role other members of your practice will play in forming and managing your council.

**Steps to Successful Formation**

1. Discuss the concept with your Practice Manager, Nurse Navigator, Clinical Supervisor, other practice providers and staff to ensure early buy-in.
2. Decide if you will build your patient council membership around a specific disease state, population or any criteria important to your success. Council membership can be a broad representation of your patient demographic with or without a common health concern. However, members who share a specific chronic condition may form a cohesive team faster than teams without this element in common.
3. The Nurse Navigator will pull a list of patients meeting the criteria you selected and present for discussion. You may need to look at 30 to 50 patients to obtain a council membership of fifteen. If fifteen patients agree to serve on your council you may only have 7 to 10 at your meetings. Ideally you hope to have at least seven patient members at every meeting but no more than twelve.

# Communications – Practice Requirements

Someone within your practice must issue invitations and follow-up with patients to confirm attendance.

Patient members of the pilot council felt that it was an honor to serve. Invitations must be extended in a way that makes recipients feel valued and therefore willing to devote time to the team. Initial selection should be done via phone call or in person if possible. The provider, nurse navigator or practice manager can reach out to the potential patient member, explain the concept and gauge interest. **The invitation may be better received coming from someone with whom the patient already has a relationship.** Once patients agree to serve meeting invitations should be mailed at least two weeks prior to each occurrence. These should be signed by the council provider and the council practice manager and include a copy of the agenda for the upcoming session. A follow-up call to confirm attendance 4 to 5 days prior to the meeting is also advisable and can be made by your PSR or other team member.

**Suggested Script for initial selection call:**

Good afternoon Mr. or Mrs. <insert patient name>,

This is <insert caller’s name> calling from the <insert practice name> practice. We are forming a Patient and Family Engagement Council at the practice and would be honored if you would agree to serve. Do you have a few minutes to hear the details?

Patients are nominated for this membership by their providers. If you agree to serve you would attend four council meetings over the year-long period and provide feedback to our staff on any issues of concern. The meetings will be held at the practice at <insert time> on the following dates: <insert the four dates>.

Since these meetings are being held during a normal lunch period we will provide lunch. (Change wording to accommodate other meeting times). Do you have any dietary restrictions we should be aware of when ordering lunch? We anticipate that the meetings will last an hour to an hour and a half. You are welcome to bring a family member with you whether or not they are a patient of our practice.

This is certainly a chance for us to learn from you as we work to improve patient care and administrative operations. But our hope is that you will also learn from us, as we provide informative sessions and share information about the various services provided here at <insert practice name>. You will also be helping other patients at the practice and within our community by ensuring we continue to improve the level of our services.

Do you have any questions? Does this sound like something you are interested in?

At this point the patient will accept, decline or hesitate. If they hesitate do not push but offer to call them back in a few days after they have discussed the invitation with family or had time to think it over.

**Suggested meeting invitation format:**

**Please join the**

**Patterson Avenue Family Practice**

**for lunch during the**

**Patient & Family Engagement Council meeting**

**at the practice**

**Tuesday, October 20, 2015**

**at 1 pm**

**You are welcome to bring a guest**

**Please call xxx-xxxx to confirm your attendance**

**Suggested Script for follow-up call:**

Good afternoon, just checking to see if you can still attend the Patient Family Engagement Council meeting on <insert date>. Thank you so much for helping us with this effort.

# Council Meetings – Practice Requirements

Block your schedules and reserve your break room or conference room for the four dates selected for your PFEC. The sessions can be held at any time convenient to all parties. If you schedule meetings during normal breakfast, lunch or dinner times the project team will order appropriate food for all attendees. If not during a meal time light refreshments appropriate to the patient population will be provided by the project team. You should make sure the room is setup to accommodate the meeting at least 30 minutes prior to the scheduled starting time.

**Agendas**

The project team can work with you to create an agenda specific to each meeting. The agenda should be mailed out with the quarterly invitations. Copies should also be available in the meeting room.

**Facilitation**

A facilitator will serve as the discussion leader for each council session. Ideally this individual should be a neutral party with no decision-making authority. If you cannot provide a facilitator from among your practice team the project team will assist in this area.

**Hand-outs**

The practice team will provide a sign-in sheet for all meetings along with the appropriate authorization forms for patients attending group meetings.

# Council Meetings – Project Team Requirements

**Meals and/or refreshments**

The project manager will work with the practice manager on menus appropriate to the council membership and will provide meals and/or refreshments for each meeting.

**Minutes/Follow-up**

The project manager or a member of the project team will take notes during each meeting and provide a written record of minutes to the practice team.

**Analytics**

The project team will monitor practice patient satisfaction scores before, during and after council formation and review reporting with the practice team.