

# Metric 3: Roles and Responsibilities of a Designated PFE Leader or Area

Chrissie Blackburn, MHA  
OHA Patient and Family Engagement sub-contractor

Lisa Morrise, MA,  
Consumers Advancing Patient Safety (CAPS)  
Partnership for Patients PFE sub-contractor

March 8, 2018

# Lisa Morisse, MA



## PFE Metric 3

- Hospital has a dedicated person or functional area that is proactively responsible for Patient and Family Engagement and systematically evaluates Patient and Family Engagement.

# Objectives for the day

- Attendees will learn key responsibilities for this role.
- Attendees will understand relevant experience of the PFE Leader.
- Attendees will be aware of the importance of the PFE Leader's relationship with hospital administrative leadership.

# What is Patient and Family Engagement (PFE)?

A set of **behaviors** by patients, family members, and health professionals and a set of **organizational policies and procedures** that foster both the **inclusion of patients and family members** as active members of the health care team and **collaborative partnerships with providers** and provider organizations to improve quality and safety within a health care organization (AHRQ, 2013).

# PFE is a strategy

PFE is the activity,  
the verb



Patient and Family Centered  
Care is the culture, the noun



OUTCOMES in patient safety,  
quality, and experience

# Questions to ponder

- How can true involvement and implementation with a PFE leader or area be achieved in your organization?
- What's already going well that you can build upon?
- What might help strengthen your approach?

# Characteristics of PFE leader or area

- Personal experience of hospitalization(s)
- Believes that patients and families have a perspective that is valuable and necessary
- Well spoken and pleasantly persistent
- Professional
- Patient (culture change is hard!)
- Constructively collaborative
- Maintains and builds positive working relationships
- Knowledgeable about PFE and how to align with organizational goals
- Emotional intelligence
- Ability to network with external hospitals



# PFE leader/area responsibilities

- Understands the importance of engaging patients **and families** while receiving care
- Educates leaders, clinicians, and other staff about PFE
- Provides training and skill setting to PFAs
- Develops, provides structure of PFACs for sustainability
- Advocates and educates about PFA participation on high level committees and boards, including quality improvement committees
- Knowledge and understanding of the 5 CMS Partnership for Patients Hospital PFE Metrics (Different PFE Metrics for TCPI/Clinical Practices)
- Has access to webinars and conferences in regard to PFE
- May represent the organization at national conferences or webinars
- Is a “lighthouse” of Patient and Family Centered Care
- Frequent updates to leadership
- External networking with other hospitals implementing PFE practices
- Looks for opportunities for PFAs or PFACs to be involved in
- Manages a budget/fiscal expectations for PFE activities (meetings, travel, events, incentives, etc.)

# Relationship of PFE leader to executive leadership

- Relationship must have purpose
- PFE leader input and guidance is sought and respected
- Structure with PFE leader is needed to support and sustain efforts and initiatives
- Work of the PFE leader is ongoing and repetitive with leadership

# Identifying appropriate staff member or person

- Knowledge about PFE and how it affects outcomes
- Access to executive leaders
- Can lead, facilitate, and promote culture change
- Respected by clinical and administrative staff

# Roles and Responsibilities

- Hospital leadership
- Staff and clinicians
- Patient and Family Advisors

# Hospital leadership

- Works with administration to get buy-in and commitment
- Keeps leadership informed about PFE initiatives, projects and achievements of PFAC(s)
- Partners with leadership to align PFE strategies with organizational goals
- Implements best practices and strategic planning for PFE and reports out to leadership regularly

# Staff and Clinicians

- Educate and train about PFE and volunteer PFAs searching opportunities to work with them
- Staff development of plans for involving patients and families at the POC and PFACs
- Helping staff understand how to interact with PFAs and how to implement their suggestions or to provide feedback about why changes may not be possible.
- Provides guidance and support to staff; addressing concerns or other barriers

# Patient and Family Advisors

- Obtaining necessary resources and cultivating opportunities for PFAC and PFA involvement.
- Overseeing the recruitment and selection of PFAs, in partnership, with volunteer services
- Communicating with PFACs in a timely manner about recruitment status and potential opportunities.
- Overseeing PFAC activities, and facilitating the ongoing engagement of PFACs.
- Bringing concerns of PFACs to leadership, or connecting PFAs with leaders
- Tracking and communicating PFAC accomplishments.

# Supporting PFE staff

- Provide some resources for educational webinars and conferences
- Engage PFE staff in quality, safety, and experience committees
- Provide training or mentoring on healthcare politics and navigation
- Present to higher leadership on PFE goals and outcomes
- Conduct timely communication
- Guide PFE staff to departments or areas that are “onboard” with PFE before organizational spread



# Reporting structure

- Solid or dotted line to Chief Nursing, Experience, or Quality officer (solid preferred)
- Mentoring should be provided by a director if a PFA is hired into the position
- Reporting structure may depend on years of healthcare experience

# Other department relationships

- Volunteer Services
- Operations
- Facilities and Environmental Services
- Quality and Safety
- Patient Experience
- Patient Education
- Patient Advocacy

# Meeting metric 3

# Question 1

Does your organization have a staff member or functional area that systematically evaluates PFE?

- a) Yes
- b) No

# Question 2

Who does that person or area report to?

- a) Chief Quality Officer
- b) Chief Experience Officer
- c) Chief Nursing Officer
- d) VP of quality
- e) VP of patient experience
- f) VP of nursing
- g) Director of quality
- h) Director of patient experience
- i) Director of nursing
- j) Other: \_\_\_\_\_

# Question 3

Does your PFE leader or area have a direct relationship with executive leadership?

- a) Yes
- b) No

# Question 4

If not, has today's webinar given you more guidance on the objectives of this role?

- a) Yes
- b) No

# Question 5

Would you like for your PFE leader or area to receive further mentoring in this area?

- a) Yes
- b) No



“The PFE leader is not for the faint of heart. Some days feel successful, but the next day, you may be sliding back down the mountain. Celebrate small successes and work with the resistance.”

*-Anonymous*

# Thank you.

## Q&A