



Using This Tool: This guide is designed to help hospitals plan and establish robust Patient and Family Advisory Councils (PFACs) to improve the quality and safety of care provided and strengthen persons and families as partners in care.

Key Definitions:

- **PFAC:** “A formal group that meets regularly for active collaboration between clinicians, hospital staff, patients, and family members on policy and program decisions.”¹
- **Patient and Family Advisors (PFAs):** “Individual(s) who have received care at your hospital and who offer insights and input to help hospitals provide care and services that are based on patient and family identified needs rather than the assumptions of clinicians or other hospital staff about what patients and families want.”²
- **Patient and Family Engagement (PFE) Metrics:** [Five measures](#) provided by the Centers for Medicare & Medicaid Services (CMS) to guide hospitals in the implementation of “active patient and family partnership at three levels of the hospital setting: point of care, policy and protocol, and governance.”³

KEY STRATEGIES	IMPLEMENTATION STEPS	RESOURCES
Secure Leadership Support	<p>Use HCAHPS (Hospital Consumer Assessment of Healthcare Providers and Systems) data, community needs assessments, and patient stories to build the business case for planning, implementing, and evaluating the changes that matter most to patients and families.</p> <p>Assess readiness for PFAC implementation by evaluating staff perceptions about the value of patient and family input on clinical experience and hospital operations.</p>	<p>Advancing the Practice of Patient- and Family-Centered Care in Hospitals, Institute for Patient- and Family-Centered Care (IPFCC), 2017</p> <p>Essential Allies: Patient Allies and Family Advisors. A Guide for Staff Liaisons*, IPFCC, 2013, pages 28–31</p>
Designate a PFAC Leader†	Appoint a staff liaison who is skilled in group facilitation, cultural competency, and written and verbal communication.	CMS PFE Metrics Guide , NYSPFP, 2018

1. P. Dardess, “Benefits of Partnering with Patient and Family Advisors,” *Institute for Patient- and Family-Centered Care*, (May 7, 2018). https://www.nyspfp.org/MeetingMaterials/351/NYSPFP_PFAC_Dardess_5_3_18.pdf (accessed March 14, 2019).

2. “Working with Patients and Families as Advisors,” *Agency for Healthcare Research and Quality*, (December 2017). <http://www.ahrq.gov/professionals/systems/hospital/engagingfamilies/strategy1/index.html> (accessed March 14, 2019).

3. “PfP Strategic Vision Roadmap for Person and Family Engagement (PFE): Achieving the PFE Metrics to Improve Patient Safety and Health Equity,” *American Institutes for Research (AIR)*, (October 2017). <https://www.healthcarecommunities.org/DesktopModules/Bring2mind/DMX/Download.aspx?portalid=3&EntryId=116336> (accessed March 14, 2019).

* Please contact your project manager if you do not have a copy of this resource

† Meets CMS PFE Metric 3

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KEY STRATEGIES	IMPLEMENTATION STEPS	RESOURCES
Designate a PFAC Leader (continued)	Define roles and responsibilities to include: <ul style="list-style-type: none"> • Overseeing the recruitment, selection, and orientation of PFAs • Meeting planning and facilitation • Fostering relationships between staff and PFAs • Maintaining communication with the hospital board[‡] 	
Define the Scope of Work	Identify opportunities for PFAC involvement using HCAHPS data, patient interviews, recent adverse events, CMS safety initiatives, new programs, or planned renovation projects. Develop a process for obtaining direction from the hospital board and reporting PFAC input to the board. Survey staff to identify unit-based improvement opportunities. Conduct patient interviews to incorporate into the consumer perspective.	Essential Allies , pages 37–38
Prepare Hospital Personnel to Work with PFAs	Identify and build internal support for PFACs among key operational and physician teams: <ul style="list-style-type: none"> • Identify PFA/PFAC supporters and engage them as champions • Meet with clinicians and staff to discuss issues and concerns about working with PFAs • Be alert for strategic opportunities to introduce PFAC concepts and integrate them into new or ongoing initiatives 	Guide to Patient and Family Engagement in Hospital Quality and Safety: Strategy 1: Working With Patients and Families as Advisors , Agency for Healthcare Research and Quality (AHRQ), 2017, tools #11, 13, 14
Recruit Diverse PFAC Members	Develop an advisor selection process to include an application, interview (in person or virtual), and acceptance or regret letters. <ul style="list-style-type: none"> • Identify a target for number of advisors based on facility size, services, and population served • Identify key qualifications and skill sets that align with the anticipated scope of work such as time, availability, communication and active listening skills, and the ability to separate personal experience from system improvement work • Seek referrals from staff, physicians, volunteers, current patients, and community agencies 	Strategy 1: Working With Patients and Families as Advisors , tools #1, 2, 3, 4, 6 Essential Allies , pages 63, 65, 67, 68 Reference your hospital's Community Needs Assessment

[‡] Meets CMS PFE Metric 5

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KEY STRATEGIES	IMPLEMENTATION STEPS	RESOURCES
Recruit Diverse PFAC Members (continued)	Publicize PFA recruitment through admissions, welcome or discharge packets, hospital websites, social media platforms, support group meetings, community organizations, senior/community centers, religious organizations, etc.	Review NYSPFP Race, Ethnicity, and Language (REaL) data report by logging into the NYSPFP Data Portal
Design an Effective Onboarding Process	<p>Design an onboarding program based on hospital policy that considers background checks, health assessments, identification badges, and time and activity records. Elements of orientation should include:</p> <ul style="list-style-type: none"> • hospital tour • confidentiality • hospital vision, mission, and values • overview of units, services, strategic initiatives, and quality and safety goals • PFA roles and responsibilities • amenities such as transportation, parking, child care, stipends, or reimbursements • key contact information 	<p>Patient and Family Advisors Orientation eLearning Program, NYSPFP</p> <p>Strategy 1: Working With Patients and Families as Advisors, tools #9–10</p>
Establish a Governance and Meeting Structure	<p>Establish PFAC membership and meeting guidelines that include size, advisor-to-staff ratio, meeting schedule, term lengths, and attendance requirements.</p> <p>Create a PFAC mission statement, charter, and bylaws.</p> <p>Determine how the PFAC fits within the organization, how it will conduct business, and the roles of the chairperson, officers, and members.</p> <p>Create a process for evaluating the PFAC and individual membership.</p>	<p>Essential Allies, pages 46–49, 83–87, 102, 104, 109, 110</p>
Coordinate Advisor Activities	<p>Invite advisors to share their experiences and perceptions during hospital committee meetings and staff orientations.</p> <p>Activities may include:</p> <ul style="list-style-type: none"> • Developing and/or revising materials such as patient and family handbooks, informational videos, patient education materials, or care instructions • Serving on taskforce and/or work groups related to facility design, the registration process, patient safety, and other quality improvement initiatives 	<p>Strategy 1: Working With Patients and Families as Advisors, pages 10, 31; tool #13</p>

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Achieve PFAC Sustainability	<p>Communicate the value of PFACs throughout the organization or health system. Celebrate and share success stories via the hospital websites, educational television channel, community newsletters, annual reports, and community assessments.</p> <p>Share feedback with advisors about the status of projects and the effectiveness of PFAC input.</p> <p>Measure and track accomplishments, and document and display data when available.</p> <p>Perform formative and summative evaluation of PFAC meetings and projects, incorporating recommendations into future work.</p>	<p><i>Essential Allies</i>, pages 87, 96, 98, 104</p>