Working With Patient and Family Advisors on Short-Term Projects

Are you (or is your unit) planning to work on a short-term project to improve quality and safety? Partnering with patient and family advisors on these projects can provide valuable insight and help make your efforts more successful.

Examples of how advisors can participate in short-term projects

Patient and family advisors can provide direct input on what is most important to them about their care. In this way, they can help you implement meaningful and effective quality and safety improvements.

Advisors can contribute by:

- **Participating in discussion groups.** You can gather patient and family advisors together for a meeting to get feedback on a specific process or resource for patients and families.
- **Revising or helping create educational or informational materials for patients and families.** Patient and family advisors can work with you to help create or revise forms, letters, handouts, instructions, and other materials.
- **Serving on a committee or workgroup.** Hospital or unit committees and workgroups can invite patient and family advisors to participate for a short time period (e.g., one or two meetings) to get feedback and ideas on a specific topic.

How are advisors selected for a project?

The staff liaison for patient and family advisors coordinates advisor participation.

The staff liaison has a database of all patient and family advisors that helps identify which advisors are best suited for your project based on their available time, areas of interest, and experience.

The checklist on the next page lists important steps in the process of working with patient and family advisors.

For more information about working with patient and family advisors, please contact:

[Insert staff liaison name]

[Insert phone number]

[Insert email]

If you are interested in requesting the involvement of patient and family advisors, please fill out the *Request for Patient and Family Advisors* form on pages 3–4.

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Steps for working with patient and family advisors

Use the checklist below to ensure effective collaboration when working with patient and family advisors.

Before requesting input from patient and family advisors:

- ❑ Prepare a brief written introduction on your project
- ❑ Provide a copy of any current materials or tools you want to revise
- ❑ Identify specific issues on which you would like input or feedback
- ❑ Identify questions you would like advisors to answer
- ❑ Specify the number of meetings and length of meetings you anticipate this project will require
- ❑ Provide the anticipated start and end dates for the project, along with anticipated meeting times
- ❑ Complete the *Request for Patient and Family Advisors* form (pages 3–4) and return it to the staff liaison, who will review your request, assist you in scheduling advisors to attend your meetings, and send materials to advisors

During meetings with patient and family advisors:

- ❑ Actively listen to feedback and ideas from advisors
- ❑ Make sure that everyone in the group — staff and patient and family advisors — is encouraged to participate in the discussion
- ❑ Stay focused on the current project
- ❑ Identify a plan for follow up at the end of the meeting
- ❑ Provide email or other contact information to accept additional comments or feedback
- ❑ Develop and share ideas about how best to follow up once you have completed the project (e.g., a meeting, conference call, or progress report)

Request for patient and family advisors

Complete this form if you are interested in working with patient and family advisors.

Requestor's name:

Date:

Unit:

Contact Information:

Provide a brief introduction (and context, if necessary) on your project:

What specific issues would you like patient and family advisor input or feedback on?

What specific questions would you like patient and family advisors to answer?

1.
2.

Is there anything else you would like potential advisors to know about your project?

Information about scheduling and time commitment:

- What is the anticipated start date for advisor participation?
- How long will advisor participation be needed?
- Will you hold meetings? If so, how many? If multiple meetings, how frequently will you meet?
- How long will the meetings run?
- What preferences do you have for meeting days and meeting times?
- What activities will advisors have to complete between meetings? How much time will these activities require?

If you are revising current materials, please attach a copy.

Please submit this form to:

[NOTE: Insert staff liaison name and contact information]