The Journey to Improving the Patient Experience: 
Utilizing Patient/Family Advisors in an 
Academic Medical Center

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I have no relevant financial relationships to disclose
Ohio State University Wexner Medical Center

- Located in Columbus Ohio
- State Tree – Buckeye Tree
- Football – OSU Buckeyes
Ohio State University Wexner Medical Center

- Academic medical center with 19,000+ employees
- Top 40 College of Medicine
- Six hospitals – heart, cancer, community, rehabilitation, behavioral health, medical/surgical
  - 1,240 Beds
  - 4,482 Births
  - 56,592 Inpatient Admissions
  - 118,280 Emergency Department Visits
  - 38,627 Surgeries
  - 1,096,992 outpatient visits
Patient/Family Engagement
Supporting Patient and Family Engagement: Best Practices for Hospital Leaders

Engaging Health Care Users: A Framework for Healthy Individuals and Communities

- CMS Partnership for Patients
- AHRQ
- AHA
EXHIBIT 1
A Multidimensional Framework For Patient And Family Engagement In Health And Health Care

<table>
<thead>
<tr>
<th>Levels of engagement</th>
<th>Continuum of engagement</th>
<th>Levels of engagement</th>
<th>Continuum of engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct care</td>
<td>Consultation</td>
<td>Involvement</td>
<td>Partnership and shared leadership</td>
</tr>
<tr>
<td></td>
<td>Patients receive information about a diagnosis</td>
<td>Patients are asked about their preferences in treatment plan</td>
<td>Treatment decisions are made based on patients’ preferences, medical evidence, and clinical judgment</td>
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<tr>
<td>Organization design and governance</td>
<td>Organization surveys patients about their care experiences</td>
<td>Hospital involves patients as advisers or advisory council members</td>
<td>Patients co-lead hospital safety and quality improvement committees</td>
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<tr>
<td>Policy making</td>
<td>Public agency conducts focus groups with patients to ask opinions about a health care issue</td>
<td>Patients’ recommendations about research priorities are used by public agency to make funding decisions</td>
<td>Patients have equal representation on agency committee that makes decisions about how to allocate resources to health programs</td>
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</table>

Factors influencing engagement:
- Patient (beliefs about patient role, health literacy, education)
- Organization (policies and practices, culture)
- Society (social norms, regulations, policy)
Patient/Family Experience Advisor Program
Patient/Family Experience Advisors

- Current/previous patients or family members who have received services at Ohio State locations
- Collaborate with Volunteer Services for screening
  - Application
  - Interview & reference check
  - Background check & fingerprinting
  - Orientation including HIPAA
Advisor Program – The Beginning

- 2004 - a James Cancer Hospital Staff member takes the journey
  - Dawn Puglisi, Director of Customer Service
- 2005 – Graduate student
- 2006 – Dedicated staff person based in the James Volunteer Services office
Advisory Council Creation
James Patient/Family Advisory Council

- Interested Advisors completed an application and were interviewed for membership
- 28 members with \( \frac{3}{4} \) being Patient/Family Advisors; \( \frac{1}{4} \) staff (Charter, included in packet)
- Meets every other month
- The James (Oncology) Council has been in existence for 4 years
  - Advisor Co-Chairs are elected
- We are experiencing a ‘natural progression’ phase
  - Strategic planning for future
Advisor Program - Timeline

2004
- Customer Service Director began journey in James Cancer Hospital
- Identified need for alternative patient/family feedback mechanism

2005
- Graduate student coordinated 12 patient and family volunteers

2006
- Position in James Volunteer Services
- 50% Volunteers
- 50% Patient/Family ‘Advisors’

2010
- Expansion across multiple hospitals
- Aligned with Patient Experience Dept.
- 100% Patient/Family ‘Experience’ Advisors
Advisory Councils Structure

- Patient Experience Committee
  - Physicians, Staff, Leadership (2 Advisors from Patient Advisory Council)

- System-Wide Patient Advisory Council
  - 22 Members

- James Patient/Family Advisory Council (Cancer)
- Buckeye Babies Advisory Council (Women's & Infants)
- Harding Advisory Council (Behavioral Health)
- Sickle Cell Advisory Council
- Future Councils ????
Recruiting, Selecting, Training Advisors
Recruiting Advisors

- Key collaboration with Volunteer Services
  - Solicits current volunteers who are survivors or caregivers
  - Director shares information with new Volunteers at Volunteer Orientation
  - Insert in Volunteer Brochure
  - External Volunteer website

- Quarterly Informational Sessions
  - One hour session
  - No obligation
  - Learn about Advisor Role
  - Hear from an Advisor
Selecting Advisors

- Informational Session provided 1st opportunity for screening
  - Characteristics of Advisors
  - Consider experiences
  - Skills and Interest Survey
- Volunteer Services screening
  - Interview
  - Background check/fingerprints
  - References
Training Advisors

- General Advisor Orientation – **coming soon**
- Speakers Training Session
  - Listen to an experienced speaker
  - IPFCC ‘Sharing your Story: Tips for Patients and Families’
  - Guide for 5 minute speech broken into 3 sections
  - Practice session scheduled for feedback
- Committee Participation
  - Orientation to committee by key staff contact
  - Background and terminology as needed
Advisor Participation
Marketing

“A CANCER-FREE WORLD BEGINS HERE

“I enjoy giving new patients a measure of hope and promise. Because this is personal. My wife and I have each survived cancer. She was there for me. I was there for her. The James has been there for both of us.”

Bernie Spreer
Cancer Survivor, Clinical Trial Patient, Volunteer, James Patient Advisor
"My life is better for being a cancer survivor. It helps me face my mortality and realize that every day is a gift."

Pete Labita

Pete Labita believes he has beaten the bogeyman. That's what cancer became for him after he was diagnosed in 2004 with squamous cell carcinoma of the jaw. But Pete says his volunteer work at The James – where he serves on committees, participates in a support group and gives talks about his experiences as a cancer patient and survivor – has helped him face it.

"Through volunteering, I got my voice, and now the specter of cancer is not so severe," he explains. "I feel free to discuss my experience with anyone, whereas before I couldn't. Volunteering has changed my perspective about cancer. It's not the bogeyman anymore."

Pete was inspired to "give back" after having a good experience as a patient at The James, where doctors removed half of his jawbone and replaced it with bone from one of his legs. He then underwent six weeks of radiation therapy.

"I hope that, by serving on committees, I can offer input that helps other patients have great experiences as well," says Pete, an ordained deacon at his church and an avid bicyclist who, in the summer of 2009, was among 2,665 riders in the inaugural Pelotonia – a grassroots cycling event that raised $4.5 million for cancer research at The James.

"By talking to others with head and neck cancer, I feel I can encourage them and help them prepare for what's ahead," he adds. "Believe it or not, my life is better for being a cancer survivor. It helps me face my mortality, reduces my fear of doctors, nurses and hospitals, and makes me realize that every day is a gift."

For more information about volunteer opportunities at Ohio State's James Cancer Hospital and Solove Research Institute, please call 614-293-4663.
Emily’s Story
Design Projects
Quality and Patient Safety

- Patients on board level quality committees
- Patient/family advisory councils
- Patients review patient-oriented materials
- Patient/family faculty programs
- Partner for quality improvement
Patient Safety Video

Be a Partner in Your Care

Here's how you can be a partner in your care:

- Let us know if you or a family member has a concern about your care or if you have a new symptom or feel worse than you did the day before.
- Clean hands are the best way to prevent the spread of infection. Make sure to keep your hands clean, and remind your visitors to do the same. You can also ask us to wash our hands, use alcohol-based hand rub or wear gloves before touching you.
- Bring a complete and updated list of your medicines, including over-the-counter products, vitamins and herbal supplements you are taking. Also let us know if you have any allergies. This will help us make sure we don’t prescribe any medicines that could affect you negatively.
- During your stay, you might be hooked up to equipment or taking medicines that make you unsteady. If you need to get out of bed, please ask us to help you. We will make sure you get out of bed safely and don’t trip or fall.

The Agency for Healthcare Research and Quality has developed a list of questions to ask your care team based on your needs.
Sally’s Story
Sample of Advisor Participation

**Committee Membership**
- Dodd Quality Committee *
- Leadership Council CQSS *
- James Patient/Family Advisory Council *
- Ross Operations Cardiac Surgery *
- System-Wide Advisory Council *
- Sickle Cell Advisory Council *
- Buckeye Babies Advisory Council *
- Chemotherapy Clearance PI Team
- Infection Control Committee *

**Public Speaking & Panels**
- Buckeye Blanket Bash Speaker
- Patient Panel for Pharmacy Students
- UH/Ross Supervisory Council Retreat
- Patient Panel for Nursing Students
- Patient Satisfaction Awards Video

**Patient Ed/Marketing**
- OSU MyChart
- Patient Navigation Initiative
- Environmental Branding
- Clean Hands Saves Lives Education
- Children’s Program Materials (Oncology)
- Regional Marketing Campaign
- Patient Room Posters

**Groups/Surveys**
- Family Support Amenities Survey
- Primary Care Group
- Inpatient Room Technology Survey
- Nutrition Services Dining on Demand
- Patient Room Whiteboards
- Nursing Response to Pain (East Hospital)
- Mock ICU Room Design
- Total Cancer Care Protocol Group
- Find a Doctor App Testing

* Indicates Ongoing

Revised 12/13
Getting To Know You
Advisors Perspective
Advisor Perspective - Pete

- Building the confidence of the Advisors
  - Feedback from staff - “Our ability to help others grow depends largely on our ability to give useful feedback” *
  - Better understanding of hospital inner workings

- Opportunities for Improvement
  - Psycho-social concerns; treating the whole person
  - Survivorship issues

Advisor Perspective - Cortney

- My story begins……...
- Volunteer interest
  - Time commitment
- Personal growth
  - Emotionally
  - Physically
  - Academically
- Buckeye Babies Advisory Council
- Speaker at New Employee Orientation
- Patient Advisory Council (System-Wide)
Advisor Perspective - Cortney

- The Advisor Program has given me a voice
- Increased my self confidence in my ability to be an advocate
- Advisor program helps to generate new ideas
- Increases existing partnership for Patient Centered Care approach
- Cultural and behavioral changes within OSU
- A multidisciplinary team approach - physicians, nurses, management/leadership, and Advisors
- Advisors provide a unique perspective by sharing personal stories and experiences
Program Measurement
Advisor Program Growth

# of Advisors

- 2006: 12
- 2008: 21
- 2010: 68
- 2012: 116
- 2013: 142
Organizational Requests
Volunteer Hours Management

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<th>1</th>
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<th>3</th>
<th>4</th>
<th>5</th>
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<td># of Volunteers</td>
<td>48</td>
<td>29</td>
<td>65</td>
<td>38</td>
<td>41</td>
<td>58</td>
<td>15</td>
<td>34</td>
<td>82</td>
<td>53</td>
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<tr>
<td>Hours Volunteered</td>
<td>178</td>
<td>94</td>
<td>206</td>
<td>143</td>
<td>105</td>
<td>125</td>
<td>38</td>
<td>81</td>
<td>234</td>
<td>156</td>
<td>45</td>
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<tr>
<td>Average per Volunteer</td>
<td>4</td>
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Number Of Hours By Month

- Jan: 200
- Feb: 100
- Mar: 200
- Apr: 150
- May: 150
- Jun: 200
- Jul: 50
- Aug: 100
- Sep: 250
- Oct: 150
- Nov: 50
- Dec: 150

Months
Lessons Learned
Advisory Councils Structure - Centralization

Patient Experience Committee
Physicians, Staff, Leadership (2 Advisors from Patient Advisory Council)

System-Wide Patient Advisory Council
22 Members

James Patient/Family Advisory Council (Cancer)
Buckeye Babies Advisory Council (Women's & Infants)
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Sickle Cell Advisory Council
Future Councils ????
Designated Patient/Family Engagement Role

- A system and method to guide PFE planning, implementation, and evaluation can be established for the organization

- Centralization of oversight or guidance with PFE initiatives streamlines education, performance tracking, collection of best practices, and evaluation of outcomes

Sue Collier, MSN, RN, FABC - North Carolina Quality Center and NoCVA HEN
10/21/2013 CMS PfP – Designated PFE Role Presentation
Lessons Learned – Creating the Program

- Administrative support
- Physician/medical champion
- Growth across system
- Academic Medical Center
- Networking is SO important!
- Preparing staff for advisor participation
  - Creating trust with advisor and staff
  - Partnership with patients/families
  - Staff responsibility and accountability when Advisor at the table
Lessons Learned – Advisory Councils

- Advisory Councils
  - Long term have natural cycles of participation
  - Each Council IS UNIQUE!
    - James (Oncology) started with large steering committee and ~ 10 months of planning
    - Women’s and Infants created quickly and they oversee agenda
  - ‘Unit’ or ‘Department’ based Councils vs. hospital based Councils
- Role of staff engagement in recruiting
Lessons Learned – Advisor Selection

- Selection is important – characteristics including personality and skills
- Being able to say no
- Experiences both positive and negative
- Lay-persons exist
- Training needed
  - Committee participation
  - Additional Speaker Training
Lessons Learned – Advisor Participation

- Advisors like to be ENGAGED
- Staff involvement/mentor on committees has an impact on Advisor
  - James Quality
- Timing of Advisor participation
  - ERT/Code Blue changes
- Barriers
  - Awareness of program
  - Resources
  - Volunteer credentialing process
Lessons Learned – Overcoming Barriers to Participation
Lessons Learned - Evaluation/Measurement

- Evaluation – staff/Advisors
  - Staff evaluation of Advisors on assignment
  - Advisor evaluation of engagement (value)
  - 360° evaluation of Advisor Program/Process

- Celebrate and publish success

- Start somewhere….anywhere….with a few good Advisors!
“OBSTACLES are not stopping points

they are direction finders”
Sharon Cross, LISW
Patient/Family Experience Advisor Program Manager
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