

# PFAC Implementation Team Action Planning Worksheet 1



EQIC developed this checklist of practice recommendations to provide process improvement strategies for consideration as hospitals work to implement a patient and family advisory council.

PRACTICE RECOMMENDATIONS	IMPLEMENTATION STATUS			ACTION PLAN/ NEXT STEPS  List specific activities your team will accomplish to fully implement each practice recommendation. Include a detailed plan (what, who, how and starting when) in your notes.
	FULLY	PARTIALLY	NONE	
<b>I. SECURE LEADERSHIP SUPPORT</b>				
A process is in place to secure leadership support.				
» Advertise, recruit and develop a team comprising of hospital leadership, patient experience officers, physicians, nursing and quality staff, unit managers, frontline staff, care transitions team members and ancillary staff.				
» Set up regular team meetings and identify roles and responsibilities, budget, ongoing communication strategies, etc.				
» Assess readiness for PFAC implementation by evaluating staff perceptions about the value of patient and family input on clinical experience and hospital operations.				
<b>II. DESIGNATE A PFAC LEADER</b>				
Appoint a staff liaison who is skilled in group facilitation, cultural competency and written and verbal communication.				
Establish liaison's roles and responsibilities, including:				
» Overseeing the recruitment, selection and orientation of patient and family advisors. Include staff training.				
» Meeting planning and facilitation.				
» Fostering relationships between staff and PFAs.				
» Maintaining communication with hospital staff.				

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<b>III. DEFINE THE SCOPE OF WORK</b>				
Develop a charter and guidelines explaining how the PFAC fits within your organization.				
» Define PFAC mission, vision, values statement and bylaws.				
» Identify the roles of the chairperson, officers and members.				
» Implement processes and polices to ensure systems and structures reflect patient and family perspectives and needs.				
» Review budget impact of the PFAC.				
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 the consumer perspective.				
Review and prepare orientation materials, such as organizational chart, etc., for newly recruited advisors.				

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<b>IV. ESTABLISH A GOVERNANCE AND MEETING STRUCTURE</b>				
Establish PFAC membership and meeting guidelines that include size, advisor-to-staff ratio, meeting schedule, term lengths and attendance requirements.				
Create a process for evaluating the PFAC and individual membership.				
<b>V. PREPARE HOSPITAL PERSONNEL TO WORK WITH PFAS</b>				
Identify and build internal support for PFACs among key operational and physician teams.				
» Identify PFA/PFAC supporters and engage them as unit champions.				
» Meet with clinicians and staff to discuss issues and concerns about working with PFAs.				
» Educate the staff on the role of the PFAC.				
» Look for strategic opportunities to introduce PFAC concepts and integrate them into new or ongoing initiatives.				
<b>VI. RECRUIT DIVERSE PFAC MEMBERS</b>				
Develop an advisor selection process to include an application, interview (in person or virtual) and acceptance or regret letters.				
» Identify a target 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.				
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.				