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Integrating Patients and Families on Quality Improvement (QI) Teams

This resource will help hospital leaders and staff understand:
1. How patient and family members can contribute to a QI team as advisors.
2. How to recruit patient and family advisors for a QI team.
3. How to prepare patient and family advisors to contribute to a QI team.

1. Two ways that patients and family caregivers can contribute to the QI team

- **Share the lived experience of being a patient at the hospital.** Every person who has received care at your hospital has a story to tell about their experience. The goal of sharing the patient story is to provide insight into how care is perceived by those receiving it. When patients share what happened during their hospital stay, important details emerge that may contribute to understanding and improving care quality and patient safety.
  For example:
  - Patients (and family members with them) can recount what they experienced during a safety event – their perspective will likely differ from that of the provider.
  - Discussing what emotions were experienced by the patient and family during their stay can be valuable, assuming there is now some distance from these emotions. For example, knowing which aspects of a safety event (such as the communication to the patient or family member) caused a negative emotional reaction can provide greater insight about how the event was experienced.
- **Provide the patient and family perspective on how to improve the quality and safety of care at the hospital.** Perspectives are points of view that are formed from experience. Patients and family caregivers have unique perspectives on quality and safety that differ from those of quality experts, clinicians, and administrators. For example, patient and family advisors can:
  - Help the team to consider what matters most to patients when designing solutions and communicating about safety events.
  - Identify opportunities to partner with hospital clinicians and staff to reduce the risk of a harm.

2. Recruiting patients and families to participate in QI teams

There are several ways to recruit potential patient and family advisors who are representative of your patient population:

- Solicit recommendations from hospital physicians, nurses, and other clinical staff or from primary care clinicians in the area.
- Approach patients and family members who volunteer in other areas of the hospital.
- Ask leaders of community groups and organizations, including churches and clubs, to inform their members about the opportunity to be a patient and family advisor.

You can create a pool of interested patient and family advisors by building awareness across your community of the opportunity to partner with the hospital. Below are some steps that you can take to build awareness:

- Make the community aware of the opportunity.
  - Distribute flyers or postcards that describe the opportunities.
  - Offer brief presentations or announcements at meetings and events.
- Make it easy for individuals to volunteer.
  - Provide a place where interested individuals can learn more or indicate their interest, such as a web page or phone number.
  - Follow up with individuals who express interest.
- Make personal invitations to individual patients and family members whenever possible.

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3. Preparing patients and families to serve on the QI team

It is important to familiarize patient and family advisors about the risk of harm associated with all hospital care. Also, patient and family advisors should agree to keep information confidential before they begin serving on the team. With effective onboarding, patient and family advisors can provide essential insight that helps the team accomplish its goals. Onboarding activities often include:

- Providing a plain language glossary of technical/medical terms and commonly used acronyms that will likely be used in team discussions.
- Educating patient and family advisors about all-cause harms in hospitals. Helping patient and family advisors understand the risks naturally associated with hospital care provides an important perspective when discussing specific safety incidents.
- Requiring patient and family advisors to sign a confidentiality agreement that restricts the sharing of safety statistics, reports, or individual cases discussed during the meeting with anyone outside of the quality team.

Remember to…

- Prepare hospital staff serving on the QI team to partner with patient and family advisors, including the roles and responsibilities of advisors.
- Encourage respect and inclusion during team discussions.

Resources

- **Tools and templates to help recruit and onboard patient and family advisors** are available at https://www.ahrq.gov/patient-safety/patients-families/engagingfamilies/strategy1/index.html
  - Templates for flyers and postcards
  - Sample onboarding presentation
  - Sample confidentiality agreement
- **Sample web page and application form:** https://www.ohsu.edu/visitors-andvolunteers/health-care-volunteer-patient-and-family-advisors
- **Online glossary of terms and acronyms commonly used in patient safety:** https://www.ncbi.nlm.nih.gov/books/NBK216074

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