



**Lakeridge
Health**

Patient and Family Advisor (PFA) Handbook



Thank you for your interest in partnering with Lakeridge Health as a Patient and Family Advisor (PFA).

Lakeridge Health has adopted several approaches to gather feedback and opinions from patients and families with a view towards generating opportunities for improvement. These include Real-Time Surveys, formal feedback and the Patient and Family Advisor program. The (PFA) program, formally built in 2016, is a diverse collective of Durham region patients and family members/essential partners-in-care, who serve our organization by teaching us about their lived experiences and by using their unique expertise to support us in enhancing the services we provide and developing new services to meet the needs of our growing population. The PFAs, annually, participate in over a hundred projects, committees, councils, and improvement events.

Your experience as a patient or family member/essential partner-in-care will contribute to how care is delivered at Lakeridge Health. This guide provides an overview of the role to assist you in your decision to apply to become an Advisor.

Lakeridge Health Vision

Lakeridge Health believes that “every interaction with patients and their families is an opportunity to enhance the quality of their experience...” Partnering with us as a Patient and Family Advisor will allow us to realize this vision.

Lakeridge Health's Patient Declaration of Values

What is a Patient Declaration of Values?

A Patient Declaration of Values is a list of values, developed in partnership between the organization and PFAs. The values reflect what is important to the community and team members when receiving and providing care.

Lakeridge Health's Guiding Principles of Partnership

In 2019, Lakeridge Health formed a working group of PFAs and team members to co-design the Guiding Principles of Partnership. The Guiding Principles of Partnership serves as Lakeridge Health's Patient Declaration of Values and aligns with the organization's commitment to Person-Centred Care.

Person-Centred Care is an approach to the planning, delivery, and evaluation of health care that is grounded in mutually beneficial partnerships among patients, clients, residents, families/essential partners-in-care, and the health-care team.

**Lakeridge Health's Guiding Principles of Partnership:
A Commitment to *Person and Family-Centred Care**

*'Person' includes the person receiving care and 'family' includes who the person wants involved in their care.

Together with patients, residents, clients, and their families, we will improve care experiences through:

- Dignity and respect
- Information sharing
- Collaboration
- Participation

We commit to:

- Respecting each other with sensitivity to differences.
- Sharing complete, accurate, and timely information.
- Collaborating in decision making to support the best choices for safe care.
- Encouraging and supporting participation in decision making and care.

In partnership with Patient & Family Experience Advisors

One System. Best Health.

Lakeridge Health

What is a PFA?



A PFA is a patient or family member/essential partner-in-care who has had recent experience at Lakeridge Health, within 2 years, in any inpatient or outpatient program. As a PFA, you bring expertise about what it is like to be a patient or family member at Lakeridge Health.

PFA's partner with team members and physicians to provide direct input into programs and practices which affect patient care and services. Your voice and your experience matter.

Is there a difference between an advisor and an advocate?

Yes. An advocate is a person who pleads the cause of another. An advisor is a person who brings their experience as a patient or family member to the decision-making table. An advisor looks at the big picture through the lens of their own experience.

Required Characteristics of a Successful PFA

- Respectful of others and their perspectives; non-judgmental
- Comfortable speaking in a group and interacting with others
- Good listener
- Able to use their personal experience constructively, towards improving the overall experience for the community; seeing the bigger picture
- Positive attitude
- Ability to work collaboratively with other PFAs and team members
- Desire to expand their knowledge and skills
- Desire to participate in bringing about meaningful change
- Able to maintain confidentiality of patient and organizational information
- Access to and comfortable using email is an asset

Roles and Responsibilities

- Partner with team members to ensure care is provided in a fully accessible environment that promotes healing, dignity, and trust.
- Keep the patient and family as the focal point of the care we provide.
- Build partnerships with teams and colleagues based on mutual respect and open communication.
- Collaborate on quality improvement initiatives, process improvement projects, program development and facility design.

- Be responsible for attending meetings and familiarizing yourself with materials sent out prior to each meeting.
- Do not discuss confidential information outside of meetings.
- Adhere to all Lakeridge Health policies, procedures and guidelines including Code of Conduct, Confidentiality and Infection Prevention and Control.

Opportunities for a PFA

PFAs participate in ways that best match their interests, experience, and availability. Opportunities can include:



Picture Credit: Stan Phillips, PFA

- ❖ **Virtual Advisor** - respond online to reviews of patient facing materials, policies, and procedures and how care can be improved.
- ❖ **Education materials** - develop/review patient and family educational materials and various websites/webpages.
- ❖ **Councils and Committees** - participate on a specific Program Council, Patient and Family Advisor Council or Committee.
- ❖ **Storytelling** - sharing your story and health care experience with team members, physicians, and other patients.
- ❖ **Short Term Projects** - short term projects or focus groups to help improve services.
- ❖ **Team member recruitment** – join an interview panel to recruit and hire new team members.
- ❖ **Hospital Facilities** – provide input to help improve patient care areas, family resource rooms, waiting rooms, etc. through small working groups, surveys or focus groups.

To ensure a mutually beneficial relationship between the PFA and Lakeridge Health, you will be placed into an opportunity through the Right Fit process.

To do so, we:

- ✓ Work with the project lead to ensure criteria is clear and well communicated.
- ✓ Set up a virtual Meet & Greet opportunity for the PFA and the team lead to get to know each other and ensure this is a good fit.
- ✓ Provide tip sheets for both PFA and team leader.
- ✓ Provide a team member partner for the PFA, where applicable.

What you can expect as a PFA

- Orientation on your role as a Patient and Family Advisor.
- Introduction to the Council/Committee/Group that you may join.
- Have abbreviations, acronyms and terms clearly defined/explained.
- Support and training – tools and tips.
- Education opportunities.
- We will honour and respect ideas and solutions.
- Timely communication.
- Open door policy.

What is expected of you

- Regularly attend to the commitments that have been made, either in person or virtually. If a PFA is unable to attend, it is required to notify the team lead.
- Provide input, insights and ideas.
- Be open to participate and express views and respect the perspective of others.
- Decline opportunities that are not meaningful and valuable.
- Follow Lakeridge Health policies and procedures; being always mindful of confidentiality and privacy.

Your commitment

- A minimum of 1 year's service
- A minimum of 1 volunteer hours per month
- Reporting service hours
- Commitment to the areas that interest you
- Communicate with us frequently
- Use your personal experience constructively

You decide how much time you volunteer as a Patient and Family Advisor. It may be a one-time activity, such as material review or story telling. It may involve on-going participation in a committee, working group, or team.

If you are not able to participate in an opportunity, please tell us. It is important to keep two-way communication open.

Meetings are held both in person and virtually, offering flexibility to participate.

Tracking Hours

Once onboarded as a PFA, you will receive a username and password to a website called MyImpactPage. We ask that you login regularly and add in the hours that you participated in an engagement opportunity. This helps us to track and celebrate the incredible amount of time that PFAs contribute to Lakeridge Health.

Training Provided/Required for the role

PFA orientation, support and recognition will be primarily through the Person-Centred Care department. All PFAs are required to participate in orientation in advance of beginning their role, and to participate in ongoing education as necessary.

Required Effort

Very light/minimal: physical effort normally found in clerical work – largely sedentary, occasional walking or standing.

Common Challenges as a PFA

Team members see you as ‘representing the public’. It is not possible, of course, for you to represent all public opinion, as you are one person with one set of life experiences.

Here is an example in case this is addressed in conversation:

- Even if you have worked or volunteered with many people whose health is affected by the opportunity you are engaging in (e.g., diabetes or mental illness), you cannot ‘represent’ their opinions or experiences.
 - How to answer: “I can’t speak to everyone’s experience, but here is my experience...”

Sometimes the project you are working on has barriers to moving forward.

- “This work is so slow! We’re not DOING anything!”
 - Committees and Councils often work slowly – this can be frustrating for members of the public who may be accustomed to more tangible results and quick turn-around. Change takes time, and it can be a considerable length of time before committee members start to see the impact of their efforts.

The role of a Patient Family Advisor is vitally important to this work, but it must be understood as a ‘long-term investment’. Please speak to the team leader if these concerns arise for you. You may be raising a timely and important theme for the committee to consider!

How do I prepare for meetings at Lakeridge Health?

- Have a brief verbal introduction of yourself:
 - Your name and that you are a Patient Family Advisor.
 - Any relevant experience that shows what you bring to the meeting or group.
- Things to bring to the meeting:
 - Any documents you were sent before the meeting, such as agenda or items for discussion. Maybe create a binder or folder to keep paper and documents together.
 - Note taking materials such as a pen and paper or notebook.
 - Personal electronic device if desired
- To be an active and effective member of a meeting, you can:
 - Review the agenda and meeting items.
 - Participate at a level you feel comfortable and understand that your voice is valued.
- For each agenda item, ask yourself:
 - How can I contribute to the discussion?
 - What is relevant information to bring to this discussion?



Debate versus dialogue

Another aspect of being an effective PFA is to look at your goal when meeting with others.

Many think that dialogue is just talking back and forth but it's more than that! Dialogue is the art of a good conversation.

Not to be confused with debate, dialogue is the peaceful way of working out a problem. Debate means stating your point of view without taking time to consider other options or getting your point across while trying to make others back down. Dialogue is the process of putting two or more different opinions together to create a unified idea.




Debate	Dialogue
Assumes that there is a right answer, and someone has it.	Assumes that many people have pieces of the answer and together they can create a solution.
Defending assumptions as truth.	Revealing assumptions for re-evaluation.
Combative: participants attempt to prove the other side wrong.	Collaborative: participants work together toward common understanding.
Defending one's own views against those of others.	Reflecting on and re-evaluating one's own views.
Listen to find flaws and make counterarguments.	Listens to understand, find meaning and agreement.
Searches for problems and weaknesses.	Searches for strengths and value in others' ideas.
Countering of the other position without consideration of feelings or relationship – often belittles or deprecates the other person.	Genuine concern for the other person and seeks to not alienate or offend.
About winning.	About discovering new options.

If you encounter conflict or issues, please connect with Lina Reid, Person-Centred Care Consultant, immediately at lireid@lh.ca

Patient and Family Engagement at Lakeridge Health

At Lakeridge Health, there are many ways that we engage patients and family member's/essential partners-in-care. Here are some of the ways that you may be asked to engage with us.

*Patients/families refers to patients, clients, residents, family members and essential partners-in-care.

	CONSULT	COLLABORATE	EXPERIENCE BASED CO-DESIGN
COMMITMENTS	<p>To obtain feedback from *patients/families, to inform various projects/initiatives by:</p> <ul style="list-style-type: none"> • Keeping patients/families informed • Listening to and acknowledging patients/families concerns/ideas. • Letting patients/families know how their feedback influenced outcomes. 	<p>To work with *patients/families, to ensure their perspectives are considered and included throughout a project/initiative by:</p> <ul style="list-style-type: none"> • Obtaining feedback from patients/families. • Ensure the feedback received from patients/families is reflected in the outcomes. • Letting patients/families know how their input directly influenced outcomes. 	<p>To partner with *patients/families and include their voice in every aspect of the project/initiative by:</p> <ul style="list-style-type: none"> • Capturing the patient/family experience • Using journey mapping to understand emotions throughout the care pathway. • Improving the experience by turning experiences into actions. • Measure the positive difference their work has made.
ACTIONS	<p>Patients/families will be engaged through:</p> <ul style="list-style-type: none"> • Surveys • Focus Groups • Comment boxes • Document reviews 	<p>Patients/families will be engaged through:</p> <ul style="list-style-type: none"> • In-person walk-throughs of areas • Council/Committee memberships • Working Groups/virtual engagements 	<p>Patients/families will be engaged through:</p> <ul style="list-style-type: none"> • Participating throughout the entire co-design initiative • In-person walk-throughs of spaces to help provide context • The evaluation processes
SYMBOL	<p>In consultation with  Patient and Family Advisors</p>	<p>In collaboration with  Patient and Family Advisors</p>	<p>In partnership with  Patient & Family Advisors</p>

Adapted from the International Association for Public Participation. (2006).

Application process for a PFA

Here are the general steps to becoming a Patient and Family Advisor at Lakeridge Health:

- Send a completed application to advisors@lh.ca
- The Person-Centred Care office will contact you to schedule an interview.
- Upon acceptance, you will be registered with Volunteer Resources and as a Patient and Family Advisor by completing and submitting all necessary documentation.
- Participate in mandatory Patient and Family Advisor orientation.

Please note: Patient and Family Advisors are considered corporate volunteers and will not become a member of any site “Auxiliary” body.

What if I choose to step down from being an Advisor?

You can choose to stop volunteering as a Patient and Family Advisor at any time during your term. Please communicate your intention, preferably in writing at advisors@lh.ca

Parking at Lakeridge Health

The cost of parking at Lakeridge Health is covered for Patient and Family Advisors for advisory business. You will be provided with information for parking upon completion of the orientation process.



Thank you!

We trust that your experience as a Lakeridge Health Patient and Family Advisor will be a meaningful one.

If you have a questions or concerns, please contact:

Person-Centred Care
905-576-8711 ext. 32434
advisor@lh.ca