



**Lakeridge
Health**

Patient and Family Experience Advisor Handbook



Thank you for your interest in partnering with Lakeridge Health as a Patient and Family Experience Advisor. Advisors ensure that the voices of patients and families are heard, considered and included. Your experience as a patient or family member/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...” Your partnering with us as a Patient and Family Experience Advisor will allow us to realize this vision.

Lakeridge Health’s Patient Declaration of Values

Lakeridge Health is committed to providing our patients and their families with a safe, high-quality care experience at our hospitals and to continuously improve in order to do so. Lakeridge Health, in consultation with the public, has developed a statement outlining what patients and their families’ value. This statement, known as the Patient Declaration of Values, will ensure our patients’ needs are well considered throughout their care journey.

At Lakeridge Health, patients, families, visitors, teams, physicians and volunteers will:

- Be treated with kindness, dignity and respect
- Value safe patient care
- Share information appropriately, clearly and confidentially
- Respect informed decisions about care
- Work together to support the plan for patient care
- Welcome and value comments, concerns and questions

The Patient Declaration of Values closely aligns with the “4 Core Principles of Patient- and Family-Centred Care” as outlined by the Institute for Patient and Family Centred Care (www.ipfcc.org)

4-Core Principles of Patient and Family Centred Care

Patient and family centred care is an approach to the planning and delivery of the best possible health care and outcomes for patients. It involves mutually beneficial partnerships among patients, families, hospital leaders and team members.

There are four core concepts to patient and family centred care:

- Dignity and Respect
- Communication/Information Sharing
- Collaboration
- Participation

We hope that our patients and their families* will experience the best of these concepts every time they interact with our hospital or that we will learn from issues together to make improvements.

Patient and Family Centered Care is working **WITH** patients and families, rather than doing **TO** or **FOR** them

What is a PFEA?



An Advisor is a patient or a family member/partner-in-care who has had recent experience, within 2 years, with care provided at any Lakeridge Health location, in any program or department. As an Advisor, you bring expertise about what it is like to be a patient or family member at Lakeridge Health. Advisors partner with teams and physicians to provide direct input into programs and practices which affect patient care and services. Your voice and your experience matters.

* family is determined by the patient and is not limited to blood ties

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 PFEA

- A patient or family member of a patient who has had recent experience, within the last 2 years, with care provided at any Lakeridge Health location
- 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; see the big picture
- Positive attitude
- Ability to work collaboratively with other Advisors and healthcare providers
- 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

- Receive direction and guidance from the Patient Experience Department through the Consultant
- Partner with teams to ensure care is provided in a fully accessible environment that promotes healing, ensures dignity and instills 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



Picture Credit: Stan Phillips, PFEA

Opportunities for a PFEA

Patient and Family Experience Advisors participate in ways that best match their interests, experience and availability. Opportunities for Advisors at Lakeridge Health can include:

- **Story Sharing** - PFEAs talk about their health care experiences with physicians, teams, and other patients.
- **Committees and Councils** - PFEAs participate on committees, councils and working groups with leadership and teams.
- **Patient Education Materials** - PFEAs review or help create materials like pamphlets and brochures that are provided to patients and family members
- **Short-Term Projects** - PFEAs partner with teams on short term projects or focus groups to help improve services.
- **Serve on a Patient and Family Advisory Council** - PFEAs meet with other patients, family members and team members to discuss and plan changes to improve hospital quality and safety.
- **Recruitment** - PFEAs partner in the process to recruit team members and present the concept of person and family-centred care.

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

To do so, we complete the following:

- Work with the project team lead to ensure criteria is clear and well-communicated
- Meet & Greet opportunity for PFEA and team lead to get to know each other and ensure this is a good fit
- Tip sheets for both PFEA and team leader
- Peer-Mentor where applicable

What you can expect as an PFEA

- Orientation on your role as a Lakeridge Health Patient and Family Experience 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 – annual Advisor Forum
- Right opportunities for the right advisor
- 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 via teleconference when available. If an Advisor is unable to attend, it is required to notify the staff lead of the opportunity
- 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 mindful of confidentiality and privacy at all times

The PFEA partnership is not:

- Taking on and implementing all patients and family's suggestions
- Dismissing or overriding professional and medical expertise and knowledge
- 'token' Advisors
- Asking for feedback when a decision is already made

Your commitment

- 1-2 year length of service
- 1+ hours monthly
- Reporting service hours (see Tracking Hours)
- Commitment to the areas that interest you
- Communication (email, phone)
- Use your personal experience constructively

You decide how much time you volunteer as a Patient and Family Experience 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 advise us. It is important to keep two-way communication open.

To accommodate Patient and Family Experience Advisors who cannot attend in person, teleconference or videoconference is available.

Our commitment to you

- Support and training – tools and tips
- Education opportunities – Advisor Forum
- Right Fit
- Honour and respect ideas and solutions
- Timely communication
- Open door policy

Tracking Hours

See Appendix A

Training Provided/Required for the role

- PFEA orientation, support and recognition will be primarily through the Patient Experience Consultant. All advisors 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 PFEA

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.

- 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...”
- “This work is so slow! We’re not DOING anything!”
 - Advisory committees often work quite 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 take a considerable length of time before committee members start to see the impact of their efforts.
- The role of a Patient Family Experience 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*
 - *That you are a Patient Family Experience Advisor*
 - *Any relevant experience that shows what you bring to the meeting or group*
- Things to bring to the meeting:
 - Paper copies of 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
- To be an active and effective member of a meeting, you can:
 - Go through the agenda and review items prior to the meeting
 - 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 effective in the advisory role is to look at your goal when meeting with others.

Many think dialogues 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 the Patient Experience Consultant immediately.

Application process for a PFEA

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

- Send an interest of application email to advisors@lh.ca
- You will be asked to submit a Lakeridge Health Patient and Family Advisor Volunteer Application.
- The Patient Experience office will contact you to schedule an interview
- Upon acceptance, register with Volunteer Services 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 Experience 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 Experience Advisor at any time during your term. Please communicate your intention with the Consultant for Patient Experience, preferably in writing at advisors@lh.ca

Parking at Lakeridge Health

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

Thank you!

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



If you have a question or concern, please contact:

Patient Experience Consultant

905-576-8711 ext. 32434

advisor@lh.ca

If you have any concerns which you feel uncomfortable raising with the Consultant, you may contact the Director of Patient Experience at 905-576-8711 ext. 32123

Appendix A



Tracking Hours Patient and Family Experience Advisors

It is important that Patient and Family Experience Advisors (PFEAs) track ALL of the hours they contribute to any Advisor work, whether it be at a Lakeridge Health site or off site (at home, an event, etc.). These hours are compiled and included in Lakeridge Health's Volunteer overall hours, which are then included in Quarterly Reports to the Lakeridge Health Board. We want to show everyone all of the amazing and inspiring work PFEAs do! **NOTE:** we encourage you to include time spent doing research, reading, using a computer etc.

Please use the attached form to track your hours. Please include the following information:

- 1. Date of Activity**
Include the month, date and year.
- 2. Activity Description and Location**
Include the location the activity took place (for example, LHO = Oshawa) and a short description of the type of activity it was (for example, Ethics Committee; or Patient and Family Advisory Council; or Reviewing Patient Education Material).
- 3. Duration**
Include the length of time you performed this activity and what time it occurred.
For example, 2hours = 530pm – 730pm
- 4. Feedback/Notes**
This space is for you to provide any thoughts, feedback, review or notes regarding the activity (if applicable).

Each month you will receive an email with BOTH a blank tracking sheet for your use during that month, and a friendly reminder to send your completed tracking sheet from the previous month back.

PLEASE NOTE: you do not have to use the Tracking Sheet! It is simply a guideline for the information we require to track your hours. You are more than welcome to just send an email to or call with the appropriate information.



**Lakeridge
Health**

Advisor Activity Hourly Tracking Sheet Patient and Family Experience Advisor

Your Name:

Month and Year:

| Date of Activity | Activity Description and Location | Duration | Feedback |
|-------------------------|--|-----------------|-----------------|
| | | | |
| | | | |
| | | | |
| | | | |

