



Cleveland Clinic

Office of Patient Experience

Voice of the Patient Advisory Council Toolkit

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Purpose

To empower patients and families to take an active role in improving the patient experience at Cleveland Clinic by providing real time feedback and creative solutions for program development or improvement

Key Factors for VPAC Success

- Identified opportunities for improving the patient experience that can be addressed through a partnership between patients, family members and caregivers
- Council includes four caregivers (clinical or non-clinical) to oversee VPAC activities
 - *Recommendation: Facilitator, Physician Champion, Nurse Champion, Administrative Support*
- Council consists of 10-12 patients and family members who represent the diversity of the Cleveland Clinic patient community
- Council members serve a term of 1 or 2 years
 - *Recommendation: Membership should be staggered*
- VPAC meetings are held at least quarterly
- Documentation of meeting minutes through online tool
- Clearly defined annual goals and projects

Roles and Responsibilities

Task	Office of Patient Experience	Institute, Clinic, Hospital	Market Research
Overview and Planning			
Review VPAC information sheet with Institute, Clinic, or Hospital	•		
Identification of patient experience improvement opportunities		•	
Distribution of VPAC resource toolkit to Institute, Clinic, or Hospital	•		
Identification of VPAC caregiver team		•	
VPAC Implementation			
Volunteer Identification		•	•
Oversight of VPAC meeting logistics		•	
Oversight of volunteer onboarding process and orientation of VPAC volunteers	•		
Scheduling and facilitation of VPAC meetings		•	
Documentation and submission of meeting minutes through online tool		•	
VPAC Sustainability			
Management of meeting minutes data	•		
Communication of goal and project completion		•	
Communication of VPAC membership changes to OPE		•	
Oversight of volunteer exiting process of VPAC members	•		
Annual VPAC meeting assessment	•		
Annually, update VPAC goals and projects		•	

Together patients and caregivers can provide innovative ideas and effective solutions within every area of Cleveland Clinic

VPAC Guidelines

Voice of the Patient Advisory Councils (VPACs)

Purpose

To empower patients and families to take an active role in improving the patient experience at Cleveland Clinic by providing real-time feedback and creative solutions for program development or improvement.

Oversight and Planning

Identification of patient experience improvement opportunities

It is recommended that the institute/clinic/hospital identify key opportunities for improvement or development before proceeding with a VPAC launch. This allows for a specific focus that will help the institute/clinic/hospital identify the best caregiver and patient/family members to serve on the VPAC. Once these key opportunities are identified and communicated to the Office of Patient Experience (OPE).

Identification of VPAC caregiver team

It is recommended that the VPAC be led by Cleveland Clinic caregivers. Up to 4 caregiver leader roles are recommended on the VPAC. One caregiver may serve in multiple roles within the VPAC (*for example, the physician champion may also function as the facilitator*).

Caregiver Roles and Responsibilities

We recommend each caregiver:

- Attends each VPAC meeting, participates in discussions and engages all members
- Commits to serve for a minimum of 1 year (approximately 6 hours/month)
- Develops rapport with VPAC members.
- Provides a report back to the VPAC on progress of ongoing projects and any hospital changes of interest to the group
- Helps the VPAC achieve established goals by removing or minimizing potential barriers
- Uses leverage/influence to implement programs in the institute

Facilitator

- Works with VPAC requestor to develop a plan and timeline for VPAC launch
 - Coordinates recruitment, interviews, member selection and orientation activities
 - Responsible for ongoing management of the VPAC, facilitates meetings and establishes expected outcomes for meetings
 - Demonstrates an ability to maintain objectivity, handle push-back and manage difficult conversations
 - Responsible for communicating initiatives to ensure VPAC ideas and activities are vetted for meaningful integration within an institute, clinic, hospital or the enterprise
 - Serve as liaison with Volunteer Services to ensure proper VPAC volunteer onboarding
 - Serve as a liaison between members on the council
-

Administrative Support (Co-facilitator)

- Serves as point of contact for patient/family members (calls/emails)
- Arranges meeting logistics (room, food, attendance)
- Responsible for publishing meeting minutes and assists with communicating VPAC activities
- Completes VPAC online reporting tool within two weeks after each VPAC meeting

Physician Champion

- Provides motivation and support for VPAC efforts
- Advocates to educate other physicians about the VPAC and encourages them to provide perspective on patient/family feedback
- Responsible for communicating VPAC initiatives to other physicians to solidify vetting and meaningful integration efforts

Nursing Champion

- Advocates practicality (reality check) by helping relate ideas to what is and is not feasible
- Advocates to educate colleagues about the VPAC

VPAC Implementation

Volunteer identification

VPAC Members' Roles and Responsibilities

Patients / Family Members

- Complete Volunteer Services application process and attend VPAC Volunteer Orientation
- Serve a minimum 1 year term
- Attend each VPAC meeting or notify a staff member in advance if unable to attend
- Engage thoughtfully and constructively around the issues and ideas discussed during each session
- Provide timely feedback when requested
- Be respectful of the unique background and perspectives of each individual member
- Rather than focusing on what is not working, individuals should be proactive in driving improvement and bring creative ideas for change

To ensure both continuity of the council and include fresh perspective, we recommend membership be staggered or half of the VPAC members be invited to serve for 1 additional year while recruiting new patients for the other half of the VPAC members.

It is recommended that the VPAC consist of 10 to 12 members representing the diversity of our Cleveland Clinic patient community. Up to 4 Cleveland Clinic caregivers also serve on the VPAC.

Members are selected based on backgrounds, experiences and strengths they could bring to the group. The ongoing goal is to have a council that accurately represents the broad spectrum of families and patients served by Cleveland Clinic.

Patient and family members can be identified:

1. Internally – using the provided sample caregiver nomination memo, which can be customized and distributed within the institute/clinic/hospital
2. Externally – using resources provided by Market Research, which can provide a broad list of patients from the institute/clinic/hospital or develop a customized screener survey to help narrow down the list. For more information about what Market Research can provide, contact Michelle Fritchen, Manager, Market Research, at 216.448.1060.

Institute/clinic/hospital can choose to utilize either, both or none of the volunteer identification tools.

After a list of patients/family members is identified:

- Institute/clinic/hospital should contact the potential candidates by phone or with the provided sample patient recruitment letter.
- Patients/family members that respond positively to the recruitment phone call/letter should be interviewed using the provided sample phone interview questions.
- VPAC caregiver team sends approval letters or dismissal letters.
- Facilitator sends contact information on all accepted members to Volunteer Services at vpacpatientexperience@ccf.org
- Volunteer Services distributes applications to members and collects applications prior to orientation.

Oversight of VPAC meeting logistics

It is recommended that meetings be held monthly or quarterly. It is recommended that meetings be 2 hours in length and a meal (either lunch or dinner) may be served before the meeting's start time (provided by the institute/clinic/hospital). If possible, meeting dates should be set well in advance for scheduling purposes. Institute/clinic/hospital is responsible to schedule, communicate and facilitate VPAC meetings.

It is expected that the members of the council will make every attempt to attend every session during their term. Participation by every patient and family member will provide the most effective meeting and make the most impact on the patient experience at Cleveland Clinic. However, in extreme cases, members may not be able to make one or more sessions. If this is the case, notification to a staff/employee member as soon as possible is expected in order to make any needed adjustments prior to the group meeting. Volunteers must sign-in when they attend VPAC meetings.

VPAC meetings will be cancelled if driving to and/or from the Cleveland Clinic area becomes unsafe. If a member resides in a location that experiences inclement weather that prohibits the member to attend a session, that member should notify a staff/employee member of their absence. Should a VPAC meeting be cancelled due to inclement weather, all council members should be notified in a timely manner by the institute/clinic/hospital.

Oversight of volunteer onboarding process and orientation of VPAC volunteers

All selected patient and family member applicants are **required** to complete the application process, including volunteer orientation. Volunteer Services will provide approved applicants with a volunteer application and instruct applicants to forward completed packet prior to orientation.

VPAC volunteers will receive a background check through Protective Services, processed by Volunteer Services. Once security clearance is obtained, Volunteer Services will send VPAC applicant information on receiving a no-cost Cleveland Clinic TB test. Volunteers must submit their TB test results to Volunteer Services in a timely manner.

Institute/clinic/hospital will coordinate with Volunteer Services to schedule its first VPAC meeting, which is to include 45-60 minutes at the beginning of the meeting for volunteer orientation, which covers Cleveland Clinic safety, security and confidentiality policies. Photographs of the VPAC volunteers will be taken and ID badges/parking stickers will be ordered and sent via interoffice mail to the facilitator. ID badges and parking stickers will be available to volunteers during the next VPAC meeting.

VPAC volunteers should wear their badges whenever they are on site participating in a VPAC session. Volunteer badges do not offer additional security access to the hospital and should not be worn during out-patient visits, inpatient stays, etc. In accordance with the Volunteer Services policy, upon completion of the term on the VPAC, the volunteer badge must be returned to the Volunteer Services Department. When attending a VPAC meeting, complimentary parking will be provided. However, standard parking fees will apply for VPAC members during other visits to the hospital (i.e., out-patient visits, inpatient stays, etc.). Volunteers must sign-in when they attend VPAC meetings.

The leaders of the VPAC and/or OPE reserve the right to dismiss in any VPAC member who is not compliant with the VPAC Guidelines. In this instance, volunteer ID badges and parking stickers must be collected and sent via interoffice mail to Volunteer Services/P66 upon exit.

Scheduling and facilitation of VPAC meetings

Meeting agendas will be set by the designated caregiver member and distributed to the membership prior to each session (see sample agenda in toolkit). When requested, VPAC will set aside agenda time to review OPE initiatives. It is recommended that sources of agenda items be considered in the following priority:

Tier 1

- Solicit ideas or projects within institute
- Solicit VPAC members to brainstorm ideas of interest
- OPE and/or hospital departments needing timely input (considered timely and required, except when involving travel or different time)

Tier 2

- Collaborate with other VPACs
 - Non-timely requests for ongoing patient feedback (from hospital departments)
-

Documentation and submission of meeting minutes through online tool

The co-facilitator should distribute the minutes/report within 2 weeks of each VPAC meeting to all VPAC staff and patient members; as well as post attendance and minutes/report out through the online survey found at:

<http://survey.clevelandclinic.org/TakeSurvey.aspx?SurveyID=VPACReport>

VPAC Sustainability

	Office of Patient Experience	Institute, Clinic, Hospital	Market Research
Management of meeting minutes data	•		
Communication of goal and project completion	•	•	
Communication of VPAC membership changes to OPE		•	
Oversight of volunteer exiting process of VPAC members	•		
Annual VPAC meeting assessments	•		
Annually, update VPAC goals and projects		•	



Memo

TO: XXX Institute/Hospital staff and employees

SUBJECT: XXX Institute/Hospital Voice of the Patient Advisory Council

Nationally, hospitals are partnering with patients and their families to incorporate their perspectives in the planning, delivery, and evaluation of health care. As you are all aware, there has been a great deal of effort at our own institution to understand and improve the patient experience.

The XXX Institute/Hospital is in the process of forming a Voice of the Patient Advisory Council (VPAC). The new council will provide a forum that encourages patients and families to actively participate in improving the patient experience at Cleveland Clinic by serving as an advisory resource for staff and leadership. Feedback from the council will be used to inform and improve hospital operations, patient safety, employee engagement/satisfaction, and patient satisfaction.

We are seeking your nominations for individuals (patients and their family members) to serve on the council. These individuals should be able to share their insight constructively, interact well with individuals of diverse backgrounds, and speak comfortably and candidly in a group. They would be volunteering their time to serve on the council (with reasonable compensation for parking and meals), and they would receive orientation and training as to the mission and goals of the institution and the advisory council, as well as hospital regulatory and privacy issues.

In addition to nominations please also send any suggestions you have for the Advisory Council to Council Leader - contact info (include email). We welcome your comments.

Administrators please forward to employees in your areas.

Thank you.



DATE

Dear XXXX:

In an effort to include patients and family members in decisions that affect how they receive care, many of Cleveland Clinic's Institutes have established patient advisory groups called *Voice of the Patient Advisory Councils* (VPAC's).

Your physician, Dr. XXX, has recommended you as a possible member for our newest council, the XXX Institute/Hospital Voice of the Patient Advisory Council (XXX Institute/Hospital VPAC).

This new council will meet for two hours every month, starting on DATE. Our goal is to integrate patient /family voices into program and policy improvement and development at Cleveland Clinic. We value your ideas into how we can improve the experience for all of our patients and families.

Enclosed you will find an explanation of council member responsibilities. If you are interested in becoming a member, please contact Council Leader Name by DATE.

Council Leader contact info (include email)

We will follow-up with you with brief phone interview.

Please feel free to call me directly if you have any questions. I look forward to hearing from you.

Sincerely,

Council Leader's Name
VPAC XXX Institute/Hospital Chairman

Enclosure

VPAC Patient & Family Members

Roles and Responsibilities

- Complete Volunteer Services application process and attend VPAC Volunteer Orientation
- Serve a minimum 1 year term
- Attend each VPAC meeting or notify a staff member in advance if unable to attend
- Engage thoughtfully and constructively around the issues and ideas discussed during each session
- Provide timely feedback when requested
- Be respectful of the unique background and perspective of each individual member
- Rather than focusing on what's not working, individuals should be proactive in driving improvement and bring creative ideas for change

To ensure continuity on the council, we recommend membership be staggered or half of the VPAC members be invited for 1 additional year to allow for new patients to step in for the other half of the VPAC members

SAMPLE

Suggested Interview Questions for Patient and Family Applicants

Voice of the Patient Advisory Councils (VPAC)

Below are examples of screening questions. The purpose of the questions is to evaluate whether the applicant is articulate, easy to understand, and how they are able to clearly express themselves. The questions should provoke responses that require an opinion to be given so you can evaluate if the applicant is willing to share their ideas. Consider adding some open screening questions related to healthcare topics that may come up in your group discussion.

Questions?

Please contact OPE at vpacpatientexperience@ccf.org.

Introduction

Patient Name: _____ Phone Number: _____

“Good morning/afternoon may I speak with _____? My name is _____ from _____ institute/hospital. Would you have a few minutes or would I be able to schedule some time for a future call?” Rescheduled day/time (if applicable) _____

“We are currently seeking current and former patients to participate in a Voice of the Patient Advisory Council and received your name from 1. a caregiver who recommended you OR 2. because you submitted a survey and selected that you would be interested in participating on a volunteer basis. The advisory council will feature 10-12 patients who would meet together with 4 caregivers either monthly or quarterly to provide feedback and creative solutions for program development or improvement. We are asking VPAC members to commit to a minimum 1 year term. Would this be something you would consider participating in? I'd like to ask you a few questions today to help determine if you would be a good fit for our advisory council.”

1. Tell me a bit about your connection or experience with _____ institute/hospital.

Answers to look for: There is not right or wrong answer to this question. However, evaluate if the applicant is articulate and easy to understand.

2. How long have you been using _____ institute/hospital for service? Do you continue to use our services? If not, how long has it been?

Answers to look for: To ensure that the information/opinions presented by VPAC members are relevant, they should have had an encounter within the last 3 months.

3. Can you name 2 or 3 strengths that you think we have in terms of working with patients and families?

Answers to look for: There is no right or wrong answer to this question. However evaluate if the applicant is articulate and easy to understand.

4. Can you recall a challenge or problem situation that you have encountered here and describe how you managed it?
-

Answers to look for: If applicant has had a negative experience, evaluate if they are able to express it constructively or if they ruminate.

5. How could we have made the situation better for you?

Answers to look for: If applicant has had a negative experience, evaluate if they are able to provide suggestions for improvement. If they are unable to provide suggestions, that might be a red flag to consider.

6. In general, can you offer 2 or 3 suggestions for improving our services to patients and families?

Answers to look for: Evaluate if the applicant is able to provide suggestions for improvement. If they are unable to provide suggestions, that might be a red flag to consider.

7. Why would you like to participate in the VPAC?

Answers to look for: There is no right or wrong answer to this question.

8. If you were on the VPAC, would you be able to commit to a 1 year term?

Answers to look for: Applicants should be willing to commit to a 1 year term.

9. Have you ever been or currently are an employee at Cleveland Clinic?

Answers to look for: While employment at Cleveland Clinic is not a disqualification of participation, the VPAC leaders should consider if they want employees on the VPAC. If employees are welcome, leaders should determine how many employees are permitted to be members of the VPAC. To encourage diversity of backgrounds among the VPAC members, the VPAC should not be comprised of all employees.

10. Do you agree or disagree with the following statement: I feel comfortable expressing myself?

Answers to look for: Applicant should agree

11. Do you agree or disagree with the following statement: I have trouble putting my ideas into words?

Answers to look for: Applicant should disagree

12. Do you agree or disagree with the following statement: I usually keep my opinions to myself?

Answers to look for: Applicant should disagree

13. If you were selected for the VPAC, what would be your ideal meeting day and time of day?

14. Do you have any questions for me?

Conclusion

Thank you for your time today. We are in the process of interviewing potential VPAC candidates and will contact you via postal mail to let you know if you have been chosen. If you are not selected, it is not because we don't value your opinion, but rather we are interested in maintaining diversity within the VPAC. We will keep applicants in mind for potential opportunities for projects outside of VPAC meetings. Thank you again for your time.



DATE

Dear XXXX,

Thank you for your interest in joining the Voice of the Patient Advisory Council! We greatly appreciate your participation in this process!

We believe that you would make a great addition to the XXX Institute/Hospital council and would like to welcome you to our group. We look forward to hearing your ideas and suggestions on how we can improve the experience for all of our patients and families.

We will be providing your contact information to the Volunteer Services Department. A representative from their department will be providing you with a volunteer application for you to complete and submit.

Please feel free to call me directly if you have any questions. I look forward to seeing you soon.

Thanks again for your willingness to make a difference!

Sincerely,

Council Leader's Name
VPAC XXX Institute/Hospital Chairman



DATE

Dear XXXX,

Thank you for your interest in joining the Voice of the Patient Advisory Council! We greatly appreciate your participation in this process!

Although you would make a great addition to the council, at this time we will be inviting other candidates to become members to ensure we have a wide range of participants. We will hold onto your application for future consideration as we will be recruiting new members each year.

Thanks again for your willingness to make a difference!

Sincerely,

Council Leader's Name
VPAC XXX Institute/Hospital Chairman

SAMPLE





VPAC First Meeting– Detailed Description of Agenda items
Approximately 2 hours

Agenda Item	Description
Welcome from Hospital Leadership	Leadership Welcome <ul style="list-style-type: none"> ▪ Hospital Administration/Leadership provides a brief welcome and thank you to VPAC members for their participation, feedback, and commitment.
Volunteer Orientation	Volunteer Coordinator leads discussion <ul style="list-style-type: none"> ▪ Volunteer Services has developed a tailored orientation.
Introductions & VPAC Roles	Facilitator lead discussion <ul style="list-style-type: none"> ▪ Facilitator introduces him/herself and their job role and role on the VPAC. ▪ Additional employees introduce their job roles and VPAC role. ▪ Have everyone go around the room and introduce themselves briefly. State name, city live in/length of time, why interested in being involved in VPAC, etc.
Share Stories <i>(purpose: To relax respondents, develop rapport and encourage interactivity)</i>	Group discussion <ul style="list-style-type: none"> ▪ Each VPAC member briefly describes his/her experience as a patient and/or as a family member of a patient.
Objectives and Goals	Facilitator lead discussion <ul style="list-style-type: none"> ▪ Describe the VPAC purpose, structure, commitment, process, report out, and VPAC impact. ▪ Discuss needs, vision and goals. ▪ Be clear and concise about commitment from each person.
Guidelines	Facilitator lead discussion <ul style="list-style-type: none"> ▪ Review VPAC Guidelines
Set Ground Rules	Facilitator lead discussion <ul style="list-style-type: none"> ▪ As a group, discuss the rules that everyone agrees to abide by during meetings: <p>Examples: (more suggestions attached)</p> <ul style="list-style-type: none"> ▪ Want to hear honest / candid opinions ▪ No good or bad answers or right or wrong responses ▪ Equal air time / no one dominates conversations ▪ Want to hear from everyone ▪ Resist venting or rehashing stories
Review Action Plan <i>(purpose: To capture achievements and projects)</i>	Facilitator review w/ Group <ul style="list-style-type: none"> ▪ How will an action plan be established? ▪ How will completed actions be communicated? ▪ Questions/Concerns/Issues.
Next Meeting Date	Co-Facilitator review w/ Group <ul style="list-style-type: none"> ▪ Dates / Time / Location for future meetings



VPAC Online Reporting Tool

We ask VPAC co-facilitators to post VPAC meeting attendance and minutes/report out through the online survey found at:

<http://survey.clevelandclinic.org/TakeSurvey.aspx?SurveyID=VPACReport>

Please complete the survey within 2 weeks of each VPAC meeting.

VPAC Report Out

Please complete a detailed report out of your VPAC meeting.

1. VPAC Institute/Area-
2. VPAC Caregiver Attendees-
3. VPAC Patient/Family Member Attendees-
4. VPAC Meeting Date
5. Facilitator Name
6. Institute Focus, System Focus or Both?
 Institute Focus System Focus Both
7. Meeting Theme/Topic(s) Discussed
8. Ideas/Suggestions for Improvement
9. Action Steps for Next Meeting
10. Projects Completed and/or Goals Met



Neutral Facilitator Training Recap

The information below is a summary of the information included in an optional three-hour course that is available through the Department of Market Research & Analytics in order to assist VPAC facilitators to gain the skills and confidence to effectively lead discussions in a neutral manner which allows for candid actionable feedback from VPAC members.

Key Stages of a Group Discussion

- Introduction to Discussion (Define Objectives, State Ground Rules, Include Ice Breaker)
- Warm-Up (Low Anxiety Questions, Time to allow Respondents to Feel Comfortable)
- In-Depth Investigation (Critical Issues / Concepts to Test)
- Closure (Summarizing What Heard, Discuss Next Steps, Promise to Update Group on Status / Progress in Future and Do It!)

Core Skills for a Facilitator to Posses

- Maintain Neutrality (Be Objective / Ensure Respondents that you are a Neutral Party)
- Refrain from Asking Leading Questions (e.g., Tell me what makes this such a great idea?)
- Listen a Lot and Talk a Little
- Show Genuine Interest in All Comments
- Educate without Skewing (When Introducing New Concepts / When Know Participants are Stating Incorrect Information)
- Engage the Entire Group
- Create a Place for Parking Lot Issues (When Respondent has their own Agenda)
- Ask Open-Ended Questions (e.g., Could you say more about how you feel about...")
- Display Good "Probing" Skills (Without asking "Why;" "Tell me more about..." "What do you mean by..." etc.)

Necessary Prep Work Prior to Discussion

- Create Discussion Guide in Advance
- Gather Materials to be Used (Examples, Handouts, etc.)
- Room Set-Up (Flip Chart / Markers, Notepads / Pens, Food / Beverages)

Behaviors to Avoid

- Being Defensive
- Making Excuses
- Justifying
- Being the Expert
- Sharing your Personal Opinion

The training includes a walk-through of more detailed examples and information as well as hands-on facilitation role-play.

If your team is interested in scheduling a training session, please contact Michelle Fretchen at FRIETCM@CCF.ORG or 216. 448.1060.