



Improving Health Care Together Kit

Patient & Family Advisory Council

Patient Partner Orientation

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About Health Quality BC (HQBC)

We Are Your Health Quality Leaders in British Columbia

Our purpose is improving health care quality across British Columbia. Our work is to build a foundation of quality, and our impact means better health care for British Columbians.

We do this by delivering the latest knowledge from home and abroad to champion and support high-quality care for every person in BC. This system-wide impact requires creativity, innovative thinking, and evidence-informed strategies to shift culture, improve clinical practice and accelerate health care partners' improvement efforts.

We are uniquely positioned to build strong partnerships with patients and communities, care providers, health leaders, policymakers, senior executives, academics and others. These connections enable us to nurture networks, recognize the needs of BC's health care system and build capacity where it is needed most. We provide advice and make recommendations to the health system, including the Minister of Health, on matters related to quality of care across the province.

By administering the [Patient Voices Network \(PVN\)](#), we enable people in BC to actively contribute to these improvements.

To learn more about support for engagement, visit [Health Quality BC](#).

Introduction

Excellent work is happening across BC and, by sharing it, we can learn from each other and grow. Adapting successful practices and improving preparation builds confidence in working together. This [Improving Health Care Together Kit](#) guides you through key steps to be involved in engagement opportunities. Here's what you can expect:

- Learn about engagement opportunities, including essential definitions.
- Understand your role as a patient partner and how to contribute.
- Apply your knowledge to deepen involvement in engagement opportunities.
- Refer to this resource if you decide to be involved.

These kits are self-directed, allowing you to learn at your own pace. Upon completion, you'll feel ready to participate in a Patient & Family Advisory Council (PFAC).

Patient & Family Advisory Councils (PFAC):

One way to foster meaningful involvement is by participating in a Patient & Family Advisory Council (PFAC). Over five modules, we'll provide a roadmap for you to understand your role in a PFAC. This kit offers guidance to help you get started.

Fraser Health's Patient Experience team, patient partners, and Health Quality BC have collaborated to create this orientation. To begin, we'll discuss the role of patient engagement within the context of a PFAC.

Definitions:

Throughout this kit, we refer to **patient partners** as individuals with lived or ongoing experiences in BC health care—as patients, family members, caregivers or community members. **Health care partners** are the leads from health care organizations responsible for coordinating these engagement opportunities.

We also identify a **patient experience team**—individuals within or outside a health care organization with expertise in engaging patient partners. This team may exist within the organization hosting the engagement opportunity, such as Fraser Health, or another provincial organization like Health Quality BC.

Module One: What is a Patient & Family Advisory Council (PFAC)?

A PFAC consists of regular meetings between health care leaders and patient partners to advance [person-centred care](#) within an organization. The scope of a PFAC can focus on a specific community, program area or project. Benefits for both health care teams and patient partners include:

- Building stronger relationships and understanding of how health care works.
- Staying informed about program activities.
- Strengthening connections around what matters most.
- Providing a consistent avenue for direct input.
- Seeing how your input influences decisions.

Types of PFACs

Within an organization, there can be different kinds of PFACs. Each is designed to meet a specific need or purpose. Review the various kinds of PFACs below and the roles of patient and health care partners within them:

PFAC Name	Role
Regional or Organization-wide	Works to improve the quality, safety and person-centred care for a whole organization or region .
Local	Focuses on improving quality, safety and person-centred care in a local health area .
Health Care Service	Aims to improve quality, safety and person-centred care in a specific health care service area . This could include different health facilities, providers and services.
Improvement Project	Focuses on improving quality, safety and person-centred care for a specific project or care process .

Which PFAC is right for you? Think about your experience and interests to help decide. Remember, not all organizations have every kind of PFAC. Some may have just one, or they might use other ways to include patient feedback. That’s okay! What matters is making sure patient input is included in ways that meet both health care and patient partner needs.

In a PFAC, Here are some examples of activities that patient partners may have the opportunity to participate in:

Which One of These Activities Interests You? ✓	
<p>Quality Walkabouts Leaders and patient partners visit different areas of a health care site to see how things are working. They learn about what is working well and what challenges people are experiencing. They observe the quality of care, how people interact, and how processes work.</p>	
<p>Accreditation Mock Tracers This activity checks if a health care organization meets specific quality standards. It follows a patient's journey or a process and involves asking questions and observing to see if everything meets these standards.</p>	
<p>Leadership Committees A group within a health care organization that focuses on making sure patient care is high quality, person-centred and that things run smoothly and efficiently.</p>	
<p>Quality Improvement These are planned projects to make processes, systems and results better. These projects use data, teamwork and planning to improve quality, efficiency and effectiveness in an organization.</p>	
<p>Redevelopment Projects These projects focus on renewing, expanding or redesigning facilities, infrastructure or services to meet the needs of patients, staff and communities.</p>	
<p><u>Leadership Job Interview Panels</u> A group of people who interview a job candidate together to ensure that the workforce meets the needs, values and preferences of patients and their families.</p>	
<p>Education & Practice When making new policies and practices, setting up training for new staff, or creating new ways of caring for people, it's important to include different perspectives. By involving patient partners—people who have real experiences with health care—you can learn more about what patients need, understand how new ideas might affect them, and make the overall experience better for everyone. This teamwork can really strengthen their</p>	

work and ensure that changes are helpful for the people who will be affected by them.	
<p>Information for the Public</p> <p>Any material available to the public will benefit from including the perspective of patient partners. For example, materials that patient partners commonly review include patient education, forms, posters, surveys, decision support tools, websites, videos or signs.</p>	

Next Steps	✓
Watch Building & Sustaining an Effective PFAC . While this video is from the United States, it provides valuable insights about an effective PFAC.	
Review the different type of PFACs and think about where your experience and interest may align.	

Why Health Care Partners Engage Patient Partners

Angela Coulter’s well-known definition of patient engagement highlights the collaboration between patients and health-care providers working together:

To promote and support active patient and public involvement in health and health care and to strengthen their influence on health-care decisions at both the individual and collective levels. (1)

For PFACs, this means that the organization is committed to learning from patient partners to enhance health care services while recognizing their vital role in these efforts.

Tips for Success

Being a part of a PFAC should be meaningful for you, beneficial for your time, and valuable to our health care system. Think about your availability and interest to see if you’re ready for this commitment. Here are some ways health care teams help to make the process comfortable for participants:

- **Connection before content – be human first.** Creating genuine connections allows for a positive, culturally safe experience. We recommend a focus on getting to know each other before diving into PFAC specifics.
- **Orientation – start things on the right track.** An introduction for you on how things work, what you need to know, and who you can go to for help. It's like a guided tour, showing you important information and helping you feel comfortable in your new role.
- **Define boundaries and roles – everyone has a purpose for being there and a role in the decisions made.** Clear roles and boundaries from the start only helps keep things on track and everyone happy.

Ask questions to ensure that you are confident with the organization's commitment to supporting you, when and how you need it.

Health care organizations have access to a variety of tools and resources to help guide the development of a PFAC. Knowledge of the principles of [Cultural Safety and Humility](#), as well as how they will address [Diversity, Equity and Inclusion](#) ensures the PFAC is reflective of the population they serve.

It's essential that you feel prepared and psychologically and emotionally safe to participate. Your approach should be rooted in mutual respect, transparency, inclusiveness, partnership, trust, responsiveness and cultural humility. Familiarity with cultural safety and humility principles helps create a supportive setting for collaborative work. Please let the health care team know how you can best be supported to ensure you are safe to participate.

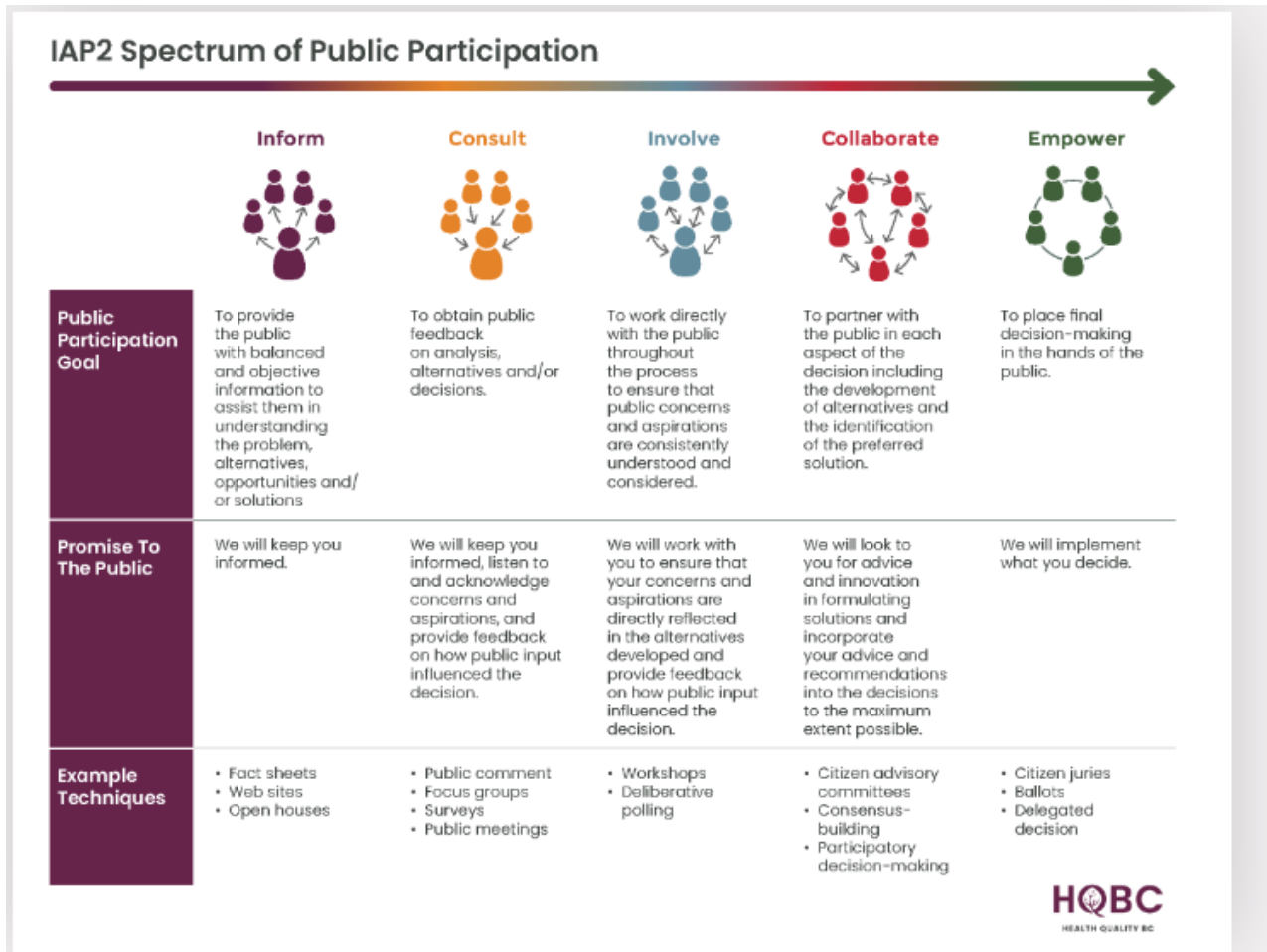
Patient Partner Compensation

Practices vary across organizations regarding expense reimbursement, honoraria or compensation for the patient partner's time. If this is something of interest to you, inquire with the sponsoring health care organization about their practice. Fraser Health provides reimbursement for any out of pocket expenses incurred to participate.

What is the Patient Partner's Role?

Defining the role of a patient partner helps everyone understand what to expect. As you consider joining a PFAC, think about what being a patient partner entails. Understanding how your feedback will be utilized is key to being prepared to participate. Health care

partners use a guide called the *Spectrum of Public Participation* to develop the PFAC, which ensures that everyone shares similar expectations. The organization commits to incorporating patient partners' input at the level where it has the most impact. Please review the spectrum carefully, as it offers valuable insight into how the health care team will receive and consider your feedback. Feel free to ask the health care team any questions as you assess whether this role is the right fit for you.



PFAC patient partner participation is at the level of INVOLVE in a range of levels from consult to collaborate.

Here is some more information to help you understand the role of a patient partner:

- Listen actively to others' viewpoints.
- Be willing to take part in health care discussions with a focus on teamwork.
- Attend and participate in meetings.
- Share your experiences and ideas to help improve the health care system.
- Talk honestly with health care partners about whether the opportunity is right for you.

Patient partners will be asked to commit to attending the PFAC meetings. There will be other opportunities presented to the PFAC members. You will not be expected to participate in these unless you are interested and available.

The frequency of PFAC meetings varies - some might meet twice a month or monthly, while others will meet every other month or quarterly. More frequent meetings tend to last one to two hours, while those happening less frequently may last two to three hours.

Next Steps	✓
Review the activities listed in the invitation to participate OR from the health care partner to decide if the activities listed are of interest to you.	
Read the Spectrum of Public Participation and patient partner role to assess whether the level of <i>involve</i> matches your expectations of involvement.	
Reflect on the Culturally Safe Engagement Guide to see if you feel confident that this opportunity is grounded in these principles.	
Determine your availability and how much time you have to participate in the PFAC meetings.	

Key Takeaways

- Definition of a Patient & Family Advisory Council
- Types of activities in a PFAC
- Definition of patient engagement
- Things to consider before expressing interest

Module Two: Preparation

To create a successful PFAC, the health care partner first picks people within the organization who have the skills and authority to help set up the PFAC. They talk about what the PFAC will focus on and who might be part of it. The planning team often includes:

Roles	Responsibilities
Executive Sponsor	Decision-maker
Patient Experience Team	Helps with planning, recruitment, onboarding, ongoing support and follow-up
Health Care Partner Liaison	Main planner and communicator for PFAC development.
Administrative Support	Handles paperwork and communication for PFAC.

Sometimes, extra members, like directors, quality improvement consultants or experienced patient partners, will help the planning team. Learning from others' experiences makes the PFAC better.

It's natural for health care teams to feel eager to launch a PFAC. However, rushing can lead to challenges, such as:

- Lack of strong leadership support
- Confusion about roles and responsibilities
- Not enough time, expertise or support for real involvement

Taking the time to build a well-rounded planning team will support a successful and impactful PFAC.

Once everyone feels ready, it's time to move forward.

Next Steps	✓
Read the Principles for Authentic Engagement for a better understanding of what's important to create a meaningful experience for patient partners.	
Review the Tips for Effective Communication .	
Read the Readiness Checklist .	

PFAC Endorsement

Securing endorsement from senior leadership is a crucial step in developing a PFAC. Their support will help define the vision, identify opportunities, and set a timeline for the PFAC. To gain this, health care partners will present to senior leadership about an overview of the PFAC and how it will help create a consistent role for patient partner input into improving health care services.

Next Steps



Learn more about the area that the PFAC will represent. Ask the health care team for details. Do an online search about the topic area.

Key Takeaways:

- The make-up of a PFAC planning team
- Health care team readiness elements

Module Three: Getting Started

Every patient partner's journey is different. You might have been part of other patient engagement activities before, or this might be your first experience. Just like your experience with BC's health care system, this is unique to you.

We recommend that health care partners take their time to find the right patient partners and help them get ready to participate. This shows the health care team's commitment to patient- and family-centred care. Building strong relationships starts with making real connections between health care teams and patient partners. Taking time to make these connections helps everyone feel understood, trusted, and comfortable.

HCPs spend time creating a recruitment plan, setting up a selection committee, and providing an orientation all help to build these relationships.

Advisory vs. Advocacy

Everyone comes into a PFAC for different reasons. That can lead to varying expectations of how input will be considered. It's essential to distinguish between "advisory" and "advocacy" roles in a PFAC. This distinction shapes the partnership:

*An **advocate** seeks to influence specific outcomes and encourages decision-makers to align with their preferred perspective.*

*An **advisor** aims to inform the decision-making process by sharing their experiences, perspectives and insights while also listening to others. (2)*

PFACs aim to engage patient partners as advisors who work collaboratively in the decision-making process.

Recruitment & Selection

Recruiting new patient partners for the PFAC helps bring fresh perspectives to the team. HCPs brainstorm about the qualities and experiences that would make a good patient partner network or pool of applicants for the PFAC. The plan usually includes:

- Choosing different ways to reach and find patient partners
- Making sure the team represents the community that uses the services
- Hosting a meet and greet to see if potential patient partners are a good fit for everyone involved.

If you are interested in being a part of a PFAC, you will be asked to RSVP to the opportunity. The RSVP form asks questions about why you are interested and what your health care experience has been.

HCPs review your RSVP and contact those that they are interested in talking with about joining the PFAC. It's important for patient partners to feel comfortable with the team. To prepare for this conversation, here are some common questions about the meet and greet process.

Question	Answer
Is this a formal interview?	No. It's an opportunity for you to meet the health care partner and ask questions.

<p>Why do they want to meet?</p>	<p>To ensure that there is a good fit between you and the health care partner. You get to ask questions, and they do, too. It gives you both more background to determine if you want to work together. This ensures that expectations for both partners are clear from the start.</p>
<p>What do I need to prepare for this meeting?</p>	<p>There is no reason for you to create materials or bring information. This is informal, designed to be in a comfortable environment. The RSVP process is the opportunity for you to share your interest and experience.</p> <p>Health care partners have this information. They may shortlist the interested patient partners from the RSVP answers.</p> <p>They may decide to meet with only a few of the patient partners who express interest. You should bring any further questions you may have to make an informed decision to work with the health care partner.</p>
<p>What happens after I meet the team?</p>	<p>You and the health care partner would have the time to decide if working together makes sense. If there is a match for both partners, there will be follow up with further details from the health care partner. If there isn't a fit, either partner would let the other know their decision to close the loop.</p>

The selection committee meets with people interested in joining the PFAC to find a good fit for everyone. Typically, a selection committee has two or three people from the department, site or program who feel comfortable leading conversations. When possible, an outgoing or current PFAC patient partner also joins the committee. After meeting with potential partners, the committee shares their impressions and suggests who might be the best fit for the PFAC.

It's important that you also ask questions of the selection committee to ensure you have all the information you need to make sure the PFAC is a good fit for your interest. Both partners should feel confident that working together on the PFAC meets expectations. Here are some questions the committee might ask during the meeting:

- Can you tell us about yourself and your interest in the PFAC?
- Where have you had care experience? Could you share an experience with us?
- What's an example of a positive care experience for you? One where you felt respected, supported, and involved in health care decisions. What did your health care team do to make you feel confident?
- Have you had any experiences that could have been better? How could the health care team have improved?
- Tell us about a great team you've been a part of. What did they do well, and how did that impact you?
- What other skills or strengths do you bring to the PFAC?
- How do you handle situations when someone has a different opinion than yours? Was there anything you did that helped?
- Some committee discussions take time. Are you okay with a slower pace, or do you prefer quicker decisions? How do you feel about a slower pace?
- Are you comfortable sharing your views with a group, even if they're different from others? What would you do in that situation?
- Tell us about a time when you felt misunderstood. How did you handle it, and what happened in the end?
- Are you comfortable sharing your health care experiences? How can we support you in doing so?
- Considering your past and current volunteer and employment history, to your knowledge are there any conflicts of interest that we should be aware of?

Sometimes when you go through this process, you might not be selected. The reasons can be varied, such as many people expressing interest. Or you might decide the engagement isn't a great fit for your expectations. Either way, there are many opportunities through Patient Voices Network that may be a better fit for you. Keep your eyes open for other ways to get involved.

Orientation

Starting the partnership with a thoughtful orientation demonstrates respect for everyone's perspectives and time. A typical PFAC orientation includes:

- Meeting other members.
- Learning about the organization's mission, structure and services.

- Understanding the specific PFAC role, scope, terms of reference and expectations.
- Answering any further questions to ensure participants feel prepared.

The scheduling of an orientation should be planned at a date/time that works for you and others. Materials would be shared in advance, where possible, and are available throughout your participation in the PFAC.

A lot of information is shared during the orientation, and you might feel overwhelmed. You are not expected to memorize this information; instead, it is meant to support you throughout your participation in the PFAC. Refer to this material regularly to help you feel informed and prepared for each PFAC meeting.

Onboarding

Creating a supportive and welcoming environment for patient partners highlights the organization’s respect for their time and partnership. Sometimes this means partnering with volunteer resources to ensure patient partners feel welcome and an important part of a community. Due to the sensitive nature of health care services, organizations may require additional things such as a criminal records check and signing a confidentiality form. Each organization will have different requirements. Any additional requirements should be shared with you at the beginning of the onboarding process.

Next Steps ✓	
Review the How to sell your experience in an RSVP to help guide you to write an RSVP of interest.	
Read through the meet and greet for information about what to expect when you meet the health care team to discuss your interest.	

Key Takeaways:

- Definition of a meet and greet
- Who is involved in a selection committee
- Definition of advocacy vs. advisory
- Questions for selection
- Content of an orientation

Module Four: Ongoing Support

Regular Patient and Family Advisory Council (PFAC) meetings support health care leaders and patient partners by:

- **Facilitating regular check-ins** for patient partners to communicate challenges you are participating in within the area that the PFAC represents and for health care leaders to provide updates.
- **Sharing insights** on local program opportunities, such as data reviews or public-facing webpages.
- **Inviting presenters** to provide information, seek insights, or recruit for new opportunities.

What to Expect – First Meeting:

Health care partners add a few agenda items to the first few PFAC meetings to ensure a solid foundation for all members. Typically, this includes opportunities for patient partners to contribute to agenda planning and potentially be a co-chair of the PFAC. Terms of Reference development and approval are also done jointly. These items include:

Agenda Item – Purpose
Approve, Consent and Share Contact List.
Annual Meeting Dates: Share the list of meeting dates for the next year, reviewing for conflicts with statutory holidays.

Once a year, the PFAC should add the following to their agenda:

Agenda Item	Purpose
List of meeting dates	Review and adapt for conflicts like statutory holidays.
Terms of Reference	Review, revise and approve.
Annual PFAC report	An annual report provides people with information about the PFAC’s activities over the course of a fiscal year.
Recruitment	Assess need for recruitment and who is available to support.

PFAC Meeting Agenda:

Having a consistent meeting agenda helps simplify planning. Here is an example of what you may see when you get involved in a PFAC.

Agenda Item	Purpose
Territory acknowledgement	A formal statement recognizing the Indigenous Peoples who have historically inhabited and stewarded the land on which the PFAC is taking place. It's a way to honour and show respect for Indigenous communities' enduring connection to the land and their ongoing contributions to society.
Check-in question	One of the priorities for PFAC meetings is to build relationships between health care leaders and patient partners. A great way to foster connection is to include a check-in activity at the beginning of each meeting.
Call for additional agenda items	A request or invitation for PFAC members to propose additional topics or issues to be discussed or addressed during the meeting. This call typically occurs before the agenda for the meeting is finalized, allowing participants to contribute their ideas and concerns to ensure that the agenda reflects the full scope of relevant topics.
Approve previous meeting minutes and meeting agenda	Common procedural steps that you agree with the minutes and agenda.
Applicable local / program / department updates	Shares work from a local / program / department that is relevant to the PFAC role in the organization.
Opportunity round table OR Opportunity highlight	Patient partners share engagement opportunities, successes, and challenges. One patient partner shares their experience.

Leadership level engagement	To share information on topics like data review / analysis, priorities, strategic plan, accreditation and public-facing webpages.
Presenter	Raise awareness, seek insight during the meeting, recruit to a new opportunity, or support the development of an engagement plan.
Upcoming opportunities and events	Review upcoming quality walkabouts, leadership panel interviews, redevelopment projects, quality committees.
Regional Patient Experience Team update	If applicable – the regional team shares work happening across the organization in patient experience.
Check-out	A designated time at the end of the meeting for participants to share their final thoughts, reflections or feedback before adjourning. It's an opportunity for PFAC members to provide any closing remarks, ask questions or offer comments on the meeting proceedings.

Key Takeaways:

- Content and definitions for a PFAC agenda
- What to expect in the first meeting
- Why regular check-ins are important

Module Five: Closing the Loop

Closing the Loop (CTL) is crucial in patient engagement and can occur when an engagement ends, or a patient partner's term concludes. It can also include ensuring you have communication at various parts of the opportunity. You should expect that HCPs:

- Acknowledge the end of the engagement and thank you for your contributions.
- Share how your contributions influenced the initiative.
- Describe how the initiative met its aims and discuss outcomes, impacts or progress made.

- Keep patient partners informed about progress and impacts throughout the engagement, not just at the end.
- Recognize that patient partners may come and go due to a variety of reasons. Transitions should have a robust closing plan helps ensure that everyone feels valued and appreciated.

Module Completion

Once you have completed this kit, you are ready to express your interest to join a PFAC and participate in a PFAC. It is your responsibility to:

- **Review the invitation** to participate and/or inquire from health care partners about the possibility of joining a PFAC.
- **Think about your experience** and interest and whether or not that aligns with what the eligibility is for the PFAC.
- **Fill out an RSVP** OR indicate your interest to the health care team.
- **Review your expectations** of involvement and prepare questions to ask the health care partner to ensure that your expectations align with the PFAC.

Key Takeaways:

- Definition of closing the loop
- Patient partner responsibilities for next steps

References

1. [Coulter A. Engaging patients in healthcare. New York \(NY\): McGraw-Hill Education; 2011. p. 10.](#)
2. [Alberta Health Services. 2017. Patient & Family Advisory Group: Orientation Handbook](#)
3. [Brockville General Hospital. 2015. Patient and Family Centred Care: Patient Advisor Handbook.](#)

Appendices

Templates are available to help you set up a PFAC. The *PFAC Roadmap* offers a broad overview on the time and steps involved in developing a PFAC. If you are interested, you can download these materials as a ZIP file. Additionally, the health authority you're working with may have customized templates to fit their organization. Be sure to check with your health care partner for any relevant documents.

Patient & Family Advisory Council Roadmap

