



partnership self-assessment

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This ten-question self-assessment is designed to support organizations in examining the current state of their efforts to partner with patient and family advisors. For the most meaningful assessment, it is suggested that you ask multiple people within your organization to complete the tool, including healthcare professionals and volunteer patient and family advisors, as perspectives may differ.*

For each statement, identify which of the options most closely aligns with your assessment of how well it captures the current state of your organization.

TO TABULATE YOUR SCORE, GIVE YOURSELF:

5 points for every “strongly agree”

4 points for every “agree”

3 points for every “neutral”

2 points for every “disagree”

1 point for every “strongly disagree”

0 points for every N/A

Use the Great Partnership Solutions (GPS) tool at the end of the self-assessment to convert your final score into a set of recommendations for next steps.



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	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	N/A
	5	4	3	2	1	0
Our Patient and Family Partnership Council (or Patient and Family Advisory Council) is an active, engaged and invested group.						
Our Patient and Family Partnership Council (or Patient and Family Advisory Council) is representative of the populations we serve.						
Our patient and family advisors are known, respected, and listened to by leadership.						
Patient and family advisor input is the predominant driver of the Patient and Family Partnership Council's agenda (versus a staff-driven agenda).						
An effective orientation and onboarding process prepares new patient and family advisors for their role.						
Staff members who work closely with patient and family advisors have received training on strategies for encouraging dialogue and nurturing these partnerships.						
In our organization, numerous committees (more than 3) outside of the Patient and Family Partnership Council include membership by at least one patient/family advisor.						
During meetings where patient and family advisors are present, these advisors frequently speak up to share their insights on the topic at hand.						
In meetings with patient and family advisors, the healthcare professionals exhibit the same level of candor and openness as they would were there no patients present.						
Patient and family advisors are always kept apprised on progress of initiatives they have been involved in.						
Total each column and add the totals together to receive your composite GPS (Great Partnership Solutions) Score.						



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GREAT PARTNERSHIP SOLUTIONS (GPS)

If you scored...	Does this describe your current state?	NEXT STEPS
38 – 50 points	<p>Congratulations!</p> <p>Partnership is not just a buzz word used by your organization; it is a way of being. Your structures, practices and culture are all aligned to promote partnership in action.</p>	<p>Now that you have seen what is possible when you partner with patient and family advisors, challenge yourself to continue breaking down barriers and welcoming patient and family involvement in ways that may have once seemed unfathomable, for instance by inviting patient advisors to participate on your quality committee or even your board of directors.</p> <p>Review your processes for recognizing long-time advisors and recruiting new ones. If you've not already done so, introduce staggered term limits for advisors to maintain a healthy balance between the experience of your more established advisors and recruiting new advisors who can bring fresh perspectives to the work.</p>
25 – 37 points	<p>You are on your way!</p> <p>It appears you have some structures in place to support the development of meaningful partnerships with patient and family advisors, but the partnerships remain somewhat superficial.</p>	<p>Effective and purposeful partnerships need to be nurtured by more than structures. It is time to take more risks with your patient and family partnership council to build trust, foster a greater sense of ownership and accountability, and create more of a sense of purpose around the work:</p> <ul style="list-style-type: none"> • If you've not done so, restructure the council's leadership to a co-chair structure, with a patient/family advisor taking on a leadership role, not only in running the meetings, but in planning the agendas and managing follow-up. • As a council, complete the Planetree What If Worksheet as a way of identifying some high impact initiatives for the group to undertake. • Invite your CEO and other senior leaders to your next meeting and structure it as an open dialogue about opportunities for improvement. • Develop a plan to embed advisors on committees outside of the partnership council. Be mindful of how you will prepare these advisors to be active participants.
12 – 24 points	<p>It may be time for a reboot.</p> <p>Perhaps you are just getting started, or maybe you're finding your organization to be mired in an established pattern that has run its course. You have the right intentions, but are struggling to convert those intentions into sustained action and partnership.</p>	<p>Invite your council leadership and other key players (be sure to include some community members) to a visioning session where you collectively envision what role your council will play and how you will define success. Outline what needs to change for you to achieve that desired state and develop a step-by-step action plan for getting there. Create a vision statement and charter for the council. Use this newly refined vision as a platform for a re-energized recruitment effort for members. Start by reaching out to patients and family members who took the initiative recently to contact the organization with either a letter/email of compliment or complaint. These highly motivated individuals could help to breathe new life into a council that has grown stagnant or to set the stage for a promising future for a new council.</p>
< 12 points	<p>You've got potential!</p> <p>Your initiative and candor in completing this self-assessment will serve you well as you embark on this journey to partnership.</p>	<p>Just do it! Pull together an internal planning team to begin researching best practices in working with patient and family advisors. Numerous resources are available through Planetree (planetree.org) as well as the Institute for Patient and Family Centered Care and other organizations. To get this initiative started on the right foot, be sure to include some community members in the earliest planning stages, perhaps drawing participants from an existing community group, such as an auxiliary, a foundation board, or the organization's board of directors. Goals of this planning team are to:</p> <ul style="list-style-type: none"> • Recruit an executive champion • Develop a charter, membership application and recruitment letter • Solicit input from staff of potential members with an eye on recruiting members who reflect the diversity of the patient population served.

Looking for more support in implementing these next steps?

Planetree offers a range of onsite coaching and training opportunities to support your organization in raising the bar for how you partner with patients and family members – regardless of your starting point. Our Experience Advisors will partner with you to develop and execute a customized implementation plan. For more information, contact Jim Kinsey, Planetree's Director of Member Experience, at 610-733-5140 or jkinsey@planetree.org.