



PATIENT AND FAMILY FACULTY PROGRAM ACTION PLAN

This resource is intended to help your team plan effectively to create or strengthen your patient and family faculty program. It is designed to be completed by a team that includes all of the key stakeholders.

Getting Started — Creating Your Planning Team

Who are the key stakeholders that need to be part of the planning process for a patient and family faculty program? *Don't forget to include patient and family advisors (PFAs).*

Role	Name
Designated Coordinator of Program	
Clinical Faculty	
PFAs	
Students/Trainees	
Other Stakeholders	

Questions

- Do you have PFAs who represent the diversity of the community served? If not, how will you recruit more representative PFAs?
- What are ways to ensure that each team member will be fully involved in planning?
- How can you build trust and relationships among members of the team?

Note: Refer to Module 2: Section 1 for more information.

Understanding Opportunities and Barriers

Modified Force Field Analysis

Complete the modified Force Field Analysis (provided as a separate template for you to use) by answering the following:

- a. What is your proposed change? Creating a new program? Strengthening or expanding an existing program? What is the timeline for that change?
- b. What opportunities (or forces supporting this change) can you utilize within your organization? How strong are these opportunities?
- c. What barriers (or forces resisting this change) do you anticipate? How difficult will it be to address them?

Level of Strength <i>(Strong, Weak)</i>	Opportunities <i>(Forces for Change)</i>	Proposed Change	Barriers <i>(Forces Resisting Change)</i>	Level of Difficulty <i>(High, Medium, Low)</i>

Questions

- a. How can you leverage the opportunities you have identified to full advantage? List 2-3 strategies to leverage each one.
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- b. How can you address the barriers you have identified? List 2-3 strategies you can implement to address the barriers you have identified.
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- c. Do you already have identified champions or support for the program or do you need to cultivate champions? List 2-3 individuals and write down how they can help.
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- d. Eventually, you will need to answer these questions about how the program will be administered.
 - Who will coordinate it?
 - Where will it be located within your organization?
 - What is the estimated budget for the program?

Note: Refer to Module 2: Section 2 for more information.

Integrating Patient and Family Faculty

There are a variety of roles for patient and family faculty. The following table lists possible roles and asks you to record the team's level of interest in engaging patient and family faculty in these roles. Remember that all of these roles require that patient and family faculty receive training and some will require more specific training and experience.

ROLE	LEVEL OF INTEREST (High or Low)
Present/facilitate didactic or case-based lectures	
Participate on panels or workshops	
Lead experiential learning opportunities as a mentor or partner	
Participate in simulations such as physical examinations and interviews	
Co-design curriculum, materials, and resources	
Evaluate competencies, knowledge, and skill acquisition	
Serve on admissions committees and in other assessments	

Questions

a. Which roles are of high interest to the team?

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b. Which roles make the most sense to begin with at your organization?

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Note: Refer to Module 2: Sections 3 and 4 for more information.

Preparing and Supporting Patient and Family Faculty in Their Roles

Sharing experiences is an important skill for patient and family faculty to have. While the roles of serving as faculty include more than storytelling, learning how to share experiences effectively to inform and inspire is essential. This table is also provided as a separate template for you to use with patient and family faculty.

Preparing Your Story

STEPS	YOUR PLAN
1. Determine goal/focus of the presentation, timing, and expectations.	
2. Pick a story or part of a story that you'll focus on.	
3. Identify what set this event in motion.	

4. What went well for you? What did not go well? What change could be made to the system or practice(s) to address what didn't go well?	
5. How could that change be instituted more broadly to affect more patients?	
6. Make the story your own, drawing from the five senses and incorporating tangible examples.	

Questions

- a. How will patient and family faculty be prepared for sharing their stories as well as other roles?

- b. What are some supports for patient and family faculty that you could build into your program?
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- c. How would they be implemented?

Note: Refer to Module 2: Section 5 and to the Resource, Orientation, Training, and Support for more information.

Preparing Clinical Faculty to Partner with Patient and Family Faculty

Questions

- a. What resources will you share with clinical faculty?
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- b. What are ways in which your program can support clinical faculty?
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- c. Who will be responsible for providing that support?

Note: Refer to Module 2: Section 6 for more information.

Partnering to Develop and Deliver Educational Content

Meaningful integration of patient and family faculty is based on collaboration. The following steps will help your team guide the development and delivery of educational content – whether it is a single class presentation, a home visiting program, or an entire course. This table is also provided as a separate template for you to use.

STEPS	YOUR PLAN
In partnership, patient and family faculty and clinical faculty...	
1. Identify the topic, activity, and learning objectives	
2. Draft the plan and content	
3. Review content with others ensuring patient and family perspectives are highlighted	
4. Co-develop outline for the presentation or activity	
5. Practice and refine the presentation or activity	
6. Deliver presentation or conduct activity	
7. Evaluate work including team dynamic and roles	

Note: Refer to Module 2: Section 7 for more information.

Evaluating a Program

Questions

- a. How will you evaluate overall course and learning activities?
- b. How will you evaluate the impact on students and trainees?
- c. How will you evaluate the effectiveness of patient and family faculty?
- d. How will you evaluate the effectiveness of clinical faculty as partners?

Note: Refer to Module 3: Evaluating a Program for more information.

Expanding a Program

Questions

- a. What are your goals for expansion of the program?
- b. What are your best areas of opportunity for program expansion?
- c. Based on the above, what specific steps do you need to take to expand?

Note: Refer to Module 3: Expanding a Program for more information.

Addressing Relevant and Timely Issues

Questions

- a. What are current and critical issues/topics that need to be integrated into the curriculum?
- b. For which of these topics is the perspective of patients and families most important?
- c. Based on the above, what specific steps can you take to integrate the topics into the curriculum?

Note: Refer to Module 3: Addressing Relevant and Timely Issues for more information.

Sustaining a Program

Questions

- a. What issues are most critical to ensure the sustainability of your program, for example:
 - Development of new partnerships (e.g., creation of an interprofessional education program)
 - Determination of permanent “home” within the organization
 - Development of succession plan for program coordinator, expansion of pool of patients and families?
- b. Prioritize those issues and outline specific steps to address them.

Note: Refer to Module 3: Sustaining a Program for more information.