

Partnering With Families in Continuous Quality Improvement: Tools and Applied Strategies

Participant Workbook

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About This Workshop

Presenters

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Description

This three-hour interactive workshop will create a safe space for assessing your progress toward partnering with families in your quality improvement work. You will also generate strategies to further deepen these partnerships by addressing identified barriers. The workshop will include sharing of best practices, individual and team work, and interactive peer-to-peer dialogue and discussion.

Objectives

By the end of this workshop, you will be able to—

- Describe to others why partnering with families to continuously improve quality can transform home visiting outcomes
- Assess your personal level of readiness to partner with families in continuous quality improvement (CQI)
- Generate short- and long-term strategies to deepen partnerships through tools, coaching provided during the workshop, peer-to-peer exchange, and other resources
- Access training and coaching resources that can be used to support state and local teams in strengthening family partnerships following the event

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Agenda

Time	Topic
2:00 – 2:20	Welcome and Objectives
2:20 – 2:40	Why Partner With Families to Improve Outcomes?
2:40 – 3:15	Activity and Discussion: <ul style="list-style-type: none">• Identify readiness to partner with families in CQI• Discussion and peer coaching
3:15 – 3:25	Break
3:25 – 4:25	World Café Discussion: Building Partnerships With Families for CQI
4:25 – 4:45	Plan Your Next Steps
4:45 – 4:55	Rapid Fire! Share One Next Step
4:55 – 5:00	Thank You and Close

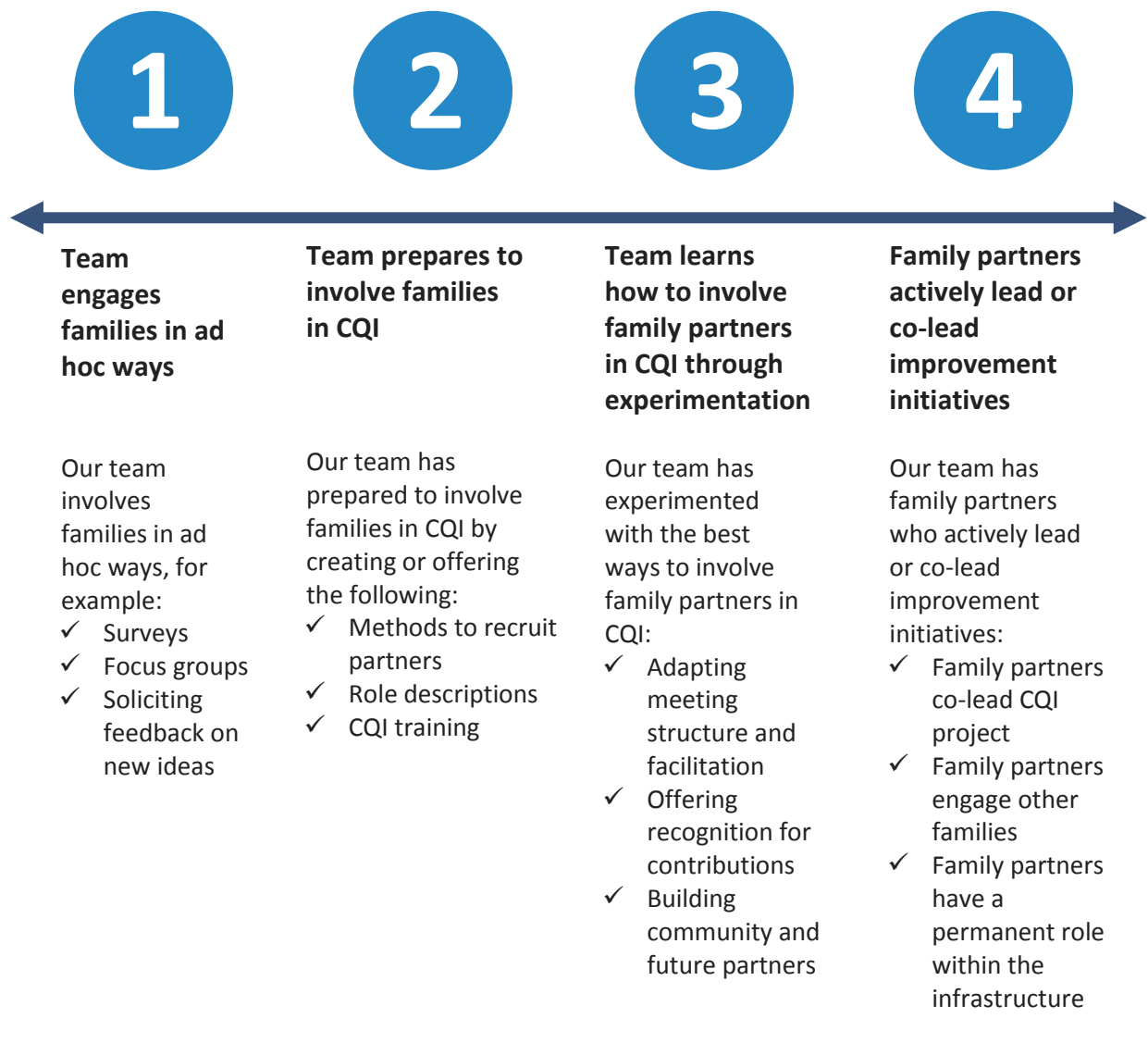
Continuum of Partnering with Families in CQI

Self-Assessing Where Family Partnerships Are Today

As a state or territory, where are you right now in terms of partnering with families for CQI?

It takes time to find the right family partners, develop relationships, and build trust. The infrastructure created by awardees and local implementing agencies (LIAs) to foster partnerships with families to improve home visiting services also happens over time.

Below is a continuum of stages of engaging family partners to actively lead or co-lead CQI initiatives. These stages are not necessarily linear; for example, you may have a longstanding partnership with family members on your CQI team yet continue to engage a broad set of families through surveys to ensure balanced perspectives.



Reflection and Discussion

Using the continuum above, reflect on your **current** and your **desired** stage for family partnerships in CQI. Fill out the table below for both your state/territory and the LIAs in your state/territory. Prepare to share your findings with others at your table.

For your state or territory: <ul style="list-style-type: none"> • Circle the phase that best represents your current phase of partnering with families in CQI • Mark with an “X” the phase where you would like to grow family partnerships in CQI 			
Ad Hoc Methods	Preparing to Involve Families	Experimenting with Ways to Involve Families	Building Leadership by Families
Provide a brief example (for the current stage only):			
For the LIAs in your state or territory: <ul style="list-style-type: none"> • Circle the phase that best represents the current phase of partnering with families in CQI • Mark with an “X” the phase where you would like your state/territory’s LIAs to grow family partnerships in CQI 			
Ad Hoc Methods	Preparing to Involve Families	Experimenting with Ways to Involve Families	Building Leadership by Families
Provide a brief example (for the current stage only):			

Activity and Discussion

Self-Assessment of Personal Readiness, Leadership, and Infrastructure to Partner With Families in CQI

Fill out the following self-assessment as a quick, informal way to identify your personal and organizational readiness to partner with families. This assessment is for your purposes only and does not need to be viewed by others. Feel free to include any comments or ideas that occur to you in the right-hand column as you consider each item. (Ideally, you would complete this assessment with others in your organization and your LIA partners to gather a more comprehensive view of readiness and to identify opportunities to strengthen family partnerships.)

Personal Readiness to Partner With Families in CQI	1 Not at All	2 A Bit	3 Neutral	4 Yes, with Reservations	5 Absolutely!	Comments (Optional)
I believe that families bring unique expertise to a quality improvement team						
I believe that family perspectives are as important to improving home visiting as my own						
I can clearly state what is expected of families in their role on an improvement team						
I feel comfortable sharing data transparently with family partners						
I feel comfortable talking about our problems openly with family partners						
I am willing to test ideas that families contribute to improve home visiting services						
I feel comfortable with families leading initiatives as part of improvement work						
Leadership Readiness to Partner With Families in CQI	1 Not at All	2 A Bit	3 Starting	4 In Progress	5 Strength!	Comments (Optional)
Our mission statement for MIECHV clearly commits to partnering with families						
Leaders in our state/territory believe that partnering with families to improve quality is a priority						
Leaders model that family participation and opinions should influence policy and priorities						
Personnel are expected to collaborate with families to improve quality as part of their job description						
Infrastructure to Partner With Families in CQI	1 Not at All	2 A Bit	3 Starting	4 In Progress	5 Strength!	Comments (Optional)
Our state/territory has advisory boards or councils to enable family participation						
Role descriptions for family partners to collaborate in CQI exist in our state/territory programs						

Financial resources have been committed to infrastructure or opportunities to build partnerships with families						
Our state/territory has families ready to work with us to improve the quality of home visiting						
There are information or communication mechanisms to share data about the quality of home visiting with families						
Our state/territory has training programs to orient family partners to their role and to learn about quality improvement						
There are opportunities for family partners to meet and learn from one another's CQI experiences						
Technology or other supports are available to encourage family participation in CQI meetings ¹						

Discussion and Peer Exchange

Discuss your findings and any reflections with others at your table.

¹ This assessment tool was adapted from the following sources:

- Institute for Healthcare Improvement, National Institute for Children's Health Quality, and Institute for Patient- and Family-Centered Care. (June 2013). *Patient- and family-centered care organizational self-assessment tool*. Retrieved from <http://www.ihq.org/resources/Pages/Tools/PatientFamilyCenteredCareOrganizationalSelfAssessmentTool.aspx>
- National Institute for Children's Health Quality. (2014). *Family engagement guide: The role of family health partners in quality improvement within a pediatric medical home*. Retrieved from <http://medicalhome.nichq.org/resource/family-engagement-guide-role-family-health-partners-quality-improvement-within-pediatric>

World Café Discussions: Building Partnerships With Families for CQI

There are tables set up corresponding to different stages in the continuum of engaging families. You will have the opportunity to visit two tables in the next hour (30 minutes per visit). It would be most helpful to select the stage that best describes the current state of family partnerships for your organization and the next stage that follows. During your visit, you will discuss the topic with colleagues, review tools to help advance your family partnerships, and receive coaching from TA providers.

Use the table on the following page to take notes and document the tools that you would like to download and use after this workshop.

Phase 1: Ad Hoc Methods to Involve Families <ul style="list-style-type: none">✓ Surveys✓ Focus groups✓ Asking for feedback on ideas to try	Phase 2: Preparing to Involve Families in CQI <ul style="list-style-type: none">✓ Recruiting family partners✓ Creating role descriptions✓ Providing CQI training for family partners
Phase 3: Experimenting with Involving Families <ul style="list-style-type: none">✓ Adjusting meeting structures✓ Meeting facilitation✓ Recognizing contributions	Phase 4: Building Leadership by Families <ul style="list-style-type: none">✓ Co-leading improvement projects✓ Engaging other families✓ Building permanent structures for family partnerships (e.g., Advisory Boards)

World Café Notes Page

Phase (check where you saw or discussed this tool to find it on the resource list)	Name/descriptor of resource:	How we can apply or adapt this resource:	Notes:
<input type="checkbox"/> Phase 1: Ad Hoc Methods <input type="checkbox"/> Phase 2: Preparing to Involve Families in CQI <input type="checkbox"/> Phase 3: Experimenting with Ways to Involve Families <input type="checkbox"/> Phase 4: Building Active Partnerships with Families <input type="checkbox"/> Other (e.g., a colleague)			For our MIECHV team: For LIAs:
<input type="checkbox"/> Phase 1: Ad Hoc Methods <input type="checkbox"/> Phase 2: Preparing to Involve Families in CQI <input type="checkbox"/> Phase 3: Experimenting with Ways to Involve Families <input type="checkbox"/> Phase 4: Building Active Partnerships with Families <input type="checkbox"/> Other (e.g., a colleague)			For our MIECHV team: For LIAs:
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Plan Your Next Steps

Reflect on what you learned throughout this workshop. What are your goals for involving families in CQI work in the short-, medium-, and long-term? What actions will you take to accomplish those goals?

Short-Term Goal (right away)	Medium-Term Goal (6 months)	Long-Term Goal (1 year)
For our MIECHV team: For LIAs:	For our MIECHV team: For LIAs:	For our MIECHV team: For LIAs:
Actions to meet this goal:	Actions to meet this goal:	Actions to meet this goal:

Resources for Partnering With Families in CQI

Resources that are starred (*) below are examples provided during the workshop.

Phase 1: Ad Hoc Methods

Focus Groups

- * The **Community Toolbox** (Chapter 3, Section 6: Conducting Focus Groups) can help you plan, prepare, conduct, and use the qualitative data from focus groups to more deeply understand community issues. <http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-focus-groups/main>
- * Section 6 also includes a sample checklist that can help you determine whether a focus group is appropriate to answer your key question(s) and whether you are adequately prepared to run a focus group. <http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-focus-groups/checklist>

Surveys

- * The **Community Toolbox** (Chapter 3, Section 13: Conducting Surveys) offers a sample checklist of steps in conducting surveys, which allows users to reflect on the choices behind their survey methodology, thus helping to ensure that all facets of the survey receive the necessary degree of forethought before the survey is administered. <http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-surveys/checklist>
- * The **Working Alliance Family Survey**, which is designed to gauge family satisfaction with a home visiting program, touches on many of the important facets of a successful partnership—including trust, appreciation, and alignment of wants and needs—and could easily be adapted for other programs. <http://hv-coiin.edc.org/sites/hv-coiin.edc.org/files/WA%20Parent.pdf>

Other Tools

HV COIIN offers a number of informal family engagement tools for LIAs:

- **What Can Healthy Families Do for You?** This one-pager from an LIA lists the benefits of home visiting and allows families to check off what is most important to them (at time of enrollment). http://hv-coiin.edc.org/sites/hv-coiin.edc.org/files/SimpleChecklistV1_0.pdf
- * **What Can Healthy Families Rappahannock Area do for you?** This one-pager was developed by an LIA to help families share their expectations of home visiting, allowing them to establish a shared understanding from the onset of services. <http://hv-coiin.edc.org/sites/hv-coiin.edc.org/files/HFRAExpectationsChecklist%20Copy.pdf>
- * This **reproducible card** developed by an LIA can be used during a home visit to check in with a family on how they rate the services they have received. <http://hv-coiin.edc.org/sites/hv-coiin.edc.org/files/CoIIN%20Check%20In%20Card.pdf>
- This **survey** assesses the family's satisfaction with home visiting services. http://hv-coiin.edc.org/sites/hv-coiin.edc.org/files/COIIN%20CQI%20Survey-1_0_0.docx
- This **Feeding Survey** assesses a family's infant-feeding practices. <https://www.surveymonkey.com/r/G2CFS9Z>

Phase 2: Preparing to Involve Families in CQI

- * **Powerful Partnerships**, by the National Institute for Children’s Health Quality, helps to facilitate the establishment of a strong partnership between families and health care professionals. Section Two: A Guide for Families (starting on page 8) focuses specifically on the role that families play in this partnership and the ways in which families can learn, grow, and empower themselves through successful collaboration with health care professionals in CQI. http://www.nichq.org/sites/default/files/resource-file/Powerful%20Partnerships_0.pdf
- * **Roles for Patients and Family Advisors in Changing the Concept of Families as “Visitors” to Families as Partners**, from the Institute for Patient- and Family-Centered Care, aims to shift the ways in which many hospitals and health care professionals view families, moving away from the concept of families as “visitors” and toward the idea that families are instead valuable partners. It also suggests several ways in which patient and family advisors can play a more active role. For hospitals and health care professionals that are actively working to change their existing policies and procedures to incorporate this new concept of the role of families, this resource can serve as a great launch pad. <http://www.ipfcc.org/bestpractices/Role-of-P-F-Advisor-2014.pdf>
- Changing hospital visiting policies can be a lengthy process that requires a considerable amount of reflection along the way. **Strategies for Changing Policies**, like the previous resource from the Institute for Patient- and Family-Centered Care, aims to help hospitals and health care professionals rethink their concept of families and family involvement in the health care process, particularly as it relates to hospital visiting policies, by providing a seven-step process to facilitate changes in these policies. <http://www.ipfcc.org/bestpractices/Strategies-for-Changing-Policies.pdf>
- One of the best ways to get families engaged and invested in home visiting is to ensure that their needs are being met and that the services provided by the home visitor are aligned to the family’s goals and expectations for the program. The same is true for getting families involved in CQI. **Partnering with Patients and Families to Enhance Safety and Quality: A Mini Toolkit**, from the Institute for Patient and Family Centered Care, provides a quick survey that can be given to parents to gauge their availability and interest in participating in CQI, thus allowing program staff to design and schedule meetings in a way that can maximize parent involvement (page 8). It also provides tips for group leaders and facilitators on involving patients and families on committees and task forces, which might be useful when considering which family partners to select (page 11), as well as some tips for preparing for and conducting meetings that include family partners, which could be applied to the home visiting setting (pages 11 and 12). <http://www.ipfcc.org/resources/Patient-Safety-Toolkit-04.pdf>
- * Family Ties of Massachusetts’ **Words of Advice: Checklist for Parents Serving as Advisors** describes benefits for families serving as advisors to a program that provides information and referrals, emotional support, and trainings to parents of children and youth with special needs. Information in this resource could be adapted to help explain to families the benefits of being involved in their home visiting program’s CQI work. The checklist includes questions that families can ask themselves to determine if they should or want to be involved. http://www.massfamilyties.org/pdf/Words_of_Advice_EIPLP.pdf
- **“Who You Gonna Call?”** This resource was written for parents who are considering participation in Interagency Coordinating Councils of the Federation for Children with Special Needs, but it can be adapted for home visiting programs. It provides considerations that may be applicable to parents who are deciding whether to participate as an advisor for a variety of organizations, and includes some things that those administering programs should keep in mind when determining which parents to ask to participate. http://medicalhome.nichq.org/sites/default/files/resource-file/Who_You_Gonna_Call.pdf
- * The National Institute for Children’s Health Quality’s **Family Engagement Guide** is a comprehensive guide on how to engage family health partners in quality improvement with a pediatric medical home,

and includes many useful components that could be adapted for home visiting—in particular, a list of benefits for families participating in quality improvement (page 6), characteristics of ideal Family Health Partners (page 9), potential activities and roles of Family Health Partners (page 11), a sample job description for a Family Health Partner (page 19), and considerations for recruitment (pages 21–23).

http://medicalhome.nichq.org/sites/default/files/resource-file/Family_Engagement_Guide_FINAL.pdf

- * The **Co-production Change Package** from ImproveCareNow, provides information and tools related to co-production, the idea that families and care providers collaborate as equal and reciprocal contributors to improve healthcare and health outcomes. Although focused on the healthcare setting, the content is applicable to home visiting programs. Section II includes information on finding the right parent or family member to join your team and how to start involving parents and Section III includes a key driver diagram and changes to test for achieving a co-production SMART aim.

[http://hv-coiin.edc.org/sites/hv-](http://hv-coiin.edc.org/sites/hv-coiin.edc.org/files/co%20production%20Change%20Package%20v3.0%20FINAL.pdf)

[coiin.edc.org/files/co%20production%20Change%20Package%20v3.0%20FINAL.pdf](http://hv-coiin.edc.org/files/co%20production%20Change%20Package%20v3.0%20FINAL.pdf)

Phase 3: Experimenting With Ways to Involve Families

- * The **Practice Improvement Team Toolkit** from the Cambridge Health Alliance discusses the use of practice improvement teams in patient-centered medical homes and goes through the steps of composing and launching a practice improvement team. Section 3: Supporting Patient Partnership (beginning on page 23) specifically details how to support the patient-partner lifecycle and provides useful resources, including what to look for in a partner, how to integrate family partners into your team, orienting family partners to this type of collaboration, and sample letters and agreements that could be applied to home visiting.

https://pfccpartners.files.wordpress.com/2013/09/cha_practice_improvement_team_toolkit-7-14.docx

- The **Michigan Family CQI In-service** resource offers an agenda and simple Power Point for orienting families to CQI work within home visiting and engaging them in a dialogue about ways to engage and partner in CQI work.

<https://drive.google.com/file/d/0B2GoVClIW0LSbFlybTFUWl9MMGM/view?usp=sharing>

Phase 4: Building Active Partnerships With Families

- * **Creating a Patient and Family Advisory Council: A Toolkit for Pediatric Practices**, is a comprehensive guide on how to engage family health partners in quality improvement with a pediatric medical home with many useful components that could be adapted for home visiting. It provides a list of benefits families participating in quality improvement receive (pg. 6), characteristics of ideal Family Health Partners (pg. 9), potential activities and roles of Family Health Partners (pg. 11), an example job description for a Family Health Partner (pg. 19), and considerations for recruitment (pgs. 21-23).

<http://www.nichq.org/sites/default/files/resource-file/PFAC%20Toolkit.pdf>

- * The National Institute for Children’s Health Quality’s **Family Engagement Guide** provides a wealth of information on how to build effective family involvement. Step 5: Evaluate, Sustain and Improve Family Engagement and the Family Health Partner Role (starting on page 40) includes a checklist that allows health care programs to meaningfully reflect on the degree to which they currently involve families in their practice and to enumerate the ways in which they are doing so. For those looking for strategies to increase family involvement, a variety of strategies are offered for sustaining, supporting, and advancing family engagement.

[http://medicalhome.nichq.org/sites/default/files/resource-](http://medicalhome.nichq.org/sites/default/files/resource-file/Family_Engagement_Guide_FINAL.pdf)

[file/Family_Engagement_Guide_FINAL.pdf](http://medicalhome.nichq.org/sites/default/files/resource-file/Family_Engagement_Guide_FINAL.pdf)

- **WIHI: The New World of Co-Producing Health and Health Care**, a resource from the Institute for Healthcare Improvement, focuses on co-production in health care and aims to help patients and health care providers optimize the collaboration that forms the basis of co-production. Although medical staff have historically been viewed as the sole engines and creators of health care, co-production challenges this view, asserting that both families and practitioners should play an important role in health care. By reframing the situation, we can create an opportunity for families and practitioners to develop mutually respectful, helpful relationships. <http://www.ihl.org/resources/Pages/AudioandVideo/WIHI-The-New-World-of-Coproducing-in-Health-and-Health-Care.aspx>
- * **Ripples of Transformation: Families Leading Change in Early Childhood Systems**, a toolkit from First 5 Alameda County, aims to help organizations optimize family engagement with CQI by focusing on three main topics: (1) engaging with their children, (2) shaping programs and services, and (3) influencing policies and systems. Through examples, strategies, resources, and stories of effective family engagement, this toolkit equips readers with a wealth of knowledge that they may then use to engage and empower families. <http://www.first5alameda.org/ripples-of-transformation-families-leading-change-in-early-childhood-systems>

Acknowledgments

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In addition to the authors above, conceptualization and development of the content for this session included the following members:

- Marybeth Cox, MIECHV awardee in Virginia
- Elizabeth Firsten, HRSA
- Monique Fountain Hanna, HRSA
- Loraine Lucinski, Education Development Center
- Matthew Poes, James Bell Associates

² Zeribi, K., Mackrain, M., & Arbour, M. (2017). *Partnering with families in continuous quality improvement: The Maternal, Infant, and Early Childhood Home Visiting Program*. OPRE Report #2017-47. Washington, DC: Office of Planning, Research and Evaluation, U.S. Department of Health and Human Services. Produced by James Bell Associates.

³ Myers, S., Powell, J., Fritz, C., Jofriet, A., Moore, L., Monti, L., & Oipari, L. (2015). *Co-production change package: Catalyzing community input, v3.0*. <http://hv-coiin.edc.org/resources/co-production-change-package>

For more information about partnering with families in continuous quality improvement, contact the DOHVE team: Susan Zaid, M.A., Deputy Project Director, James Bell Associates, szaid@jbassoc.com.

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