



VETERAN ADVISORS AND ADVISORY COUNCILS

Updated 2023

PURPOSE

The Veteran/Family Advisor serves as an important voice of the Veteran/Family population, and helps communicate the perceptions, concerns and needs of Veteran patients and/or their family members. Including the voice of those we serve; our customers, provides an insight into the execution and delivery of services from the vantage point of those receiving the service. Veteran/Family Advisors provide individual viewpoints only. Their work does not implicate the Federal Advisory Committee Act.



Veteran and Family Advisory Councils create an excellent collaborative partnership with Veteran patients, families and staff to enhance the Veteran experience, develop policy and program development, foster professional development and impact the delivery of care.

These collaborative partnerships can take place through the continuum of the healthcare system including:

- Clinical areas (bedside/clinic)
- Environment & Design
- Communications/Language
- Human Resources
- Patient Safety
- Strategic Planning
- Technology/Information
- Management
- Administrative and Financial systems
- Quality and Safety



BENEFITS

- Solidifies the concept of proactive patient-driven care into practice for both patients and staff
- Helps to facilitate staff engagement with patients to better understand the Veteran's experiences
- Creates opportunities for organizational change to enhance patient and family centered care
- Could help improve the public image and reputation of the medical facility.

CRITERIA FOR VETERAN/FAMILY PARTICIPATION AS AN ADVISOR

The general membership for the Veteran/Family Advisors shall consist of patients, family members, and/or guardian of those who utilize the services in the VA Healthcare system. All Veteran/Family Advisors must register as a Volunteer through the VA Medical Center Voluntary Service Program.

Key criteria include:

- Must be a patient, family member, or guardian of a patient who is/has received care within the medical center or CBOC.
- Must complete a Voluntary Service Application, attend a brief orientation session, and submit any other required paperwork for medical center compliance
- Must maintain the confidentiality of the patient population and refrain from discussing confidential information outside council meetings
- Must be able to join council meetings in the format set by the healthcare system i.e. virtual, in-person, virtual from community based outpatient clinic (CBOC)

Key Decision:

- Determine whether Veteran employees and/or Veteran Service Organization representatives will be considered as potential members.
- Facilities may choose to exclude employees and have only non-employee Veterans serve as advisors.

KEY QUALITIES OF AN ADVISOR

- Excellent communication skills and listening skills
- Ability to see beyond one's own personal experiences
- Ability to use own personal experiences in a constructive manner
- Ability to be non-judgmental
- Ability to maintain a positive attitude
- Ability to work with a diverse multicultural population and their family members
- Ability to perform in the role as both a Veteran/Family Advisor and as a consumer
- Ability and willingness to expand knowledge and skills
- Willingness to participate in bringing about meaningful change
- Respects the opinions of others, even when they conflict with one's own views by maintaining open-mindedness

RECRUITMENT

Key Decision: Determine whether recruitment will be open to all who express interest or restricted to staff referrals.

Staff Referral:

1. Educate facility staff about the advisor program and ask them for suggestions of patients that fit the descriptions provided above
 - a. Post flyers in break areas
 - b. Hold educational Live Meeting sessions
 - c. Educate at facility Director Staff Meetings, Town Hall, New Employee Orientation etc.

Open Recruitment:

1. Work with Voluntary Service to identify/suggest potential advisors
2. Invite Patients and Family Members to self-identify
 - a. Advertise in weekly publications
 - b. Advertise in clinic areas

Recruitment Resources*

- [Recruiting Flyer](#)
- [Tips for Recruiting](#)
- [Bulletin](#)
- [Staff Awareness](#)
- [Patient Advisory Brochure](#)
- [Family Advisory Council Brochure](#)
- [Army Patient and Family Council Brochure](#)



* Additional Resources on MS Teams

SELECTION

Once individuals are identified as potential advisors, the following process may be considered to optimize the selection of the best fit for your facility:

- a) Classify the patient's level of interest by conducting a phone screening. Develop a list of questions, no more than 5 or 6 that helps provide a good overview of the interest of the patient to serve as well as the skill level to serve effectively (based on identified qualities and skills listed above).
- b) Set up a face to face interview. The interview process is to further understand the level of interest of the patient, understand his/her skills to serve as an advisor.
- c) Work with Voluntary Service to orient and process patients selected to serve as volunteers.
 - Voluntary Service may ask for a description of duties for advisors.
 - Advisors should represent the entire continuum of care and departments within the medical center.
 - Align advisory council needs with the policy and regulations of Voluntary Service to utilize those individuals who are eligible to serve as Volunteers.

Selection Resources*

- [Phone Screening Tool](#)
- [Interest Application for Advisors](#)
- [Interview Form](#)
- [Advisory Council Member Position Description](#)
- [Council Member Position Description](#)



* Additional Resources on MS Teams

ORIENTATION FOR NEW ADVISORS

Veteran patients and family members recruited as advisors will have some working knowledge of the VHA and the local facility. However, as they take on the role of a patient centered care patient advisor, it is important to orient them to the role and expectations of the position in which they will be serving. The goal of orientation is to provide basic information about Patient Centered Care, explore the role of the advisors for the facility, and orient the advisors to all aspects of services offered at the facility creating a well-rounded knowledgeable advisor.

Utilize the outline below in developing an orientation program for advisors that fit your facility needs. As your program matures, consider including advisors as potential facilitators or to help develop material.

Key Decisions: Developing a Patient Advisor Orientation Session:

- Determine length of session- Varies from: ½ day, 1 or 2 full days.
- Determine frequency of the orientation: biweekly, monthly, quarterly, annually

- Identify space/venue to conduct sessions: auditorium or classroom styles most suitable, MS Teams or Zoom most accessible virtual platforms
- Coordinate with other medical center personnel to facilitate sections of the agenda.
- Identify Overall Objectives:
 - Explain how concepts in partnering with veterans and families can improve the experience of care and clinical outcomes.
 - Describe Veteran- and family-centered care, and how it can be applied to inpatient and outpatient care including committee and policy development.
 - Assist advisors with developing skills to share observations and personal experiences
 - Identify opportunities/capacities in which advisors may serve i.e. hospital-wide committees, rapid process improvement workshops, communication trainings, staff presentations. Orient advisors to services available at the facility

Orientation Resources*

- [Sharing Your Story](#)
- [Partnerships In Veteran Centered Care](#)
- [Orientation for Patients and Families: Topics to include](#)
- [Building an Advisory Program](#)
- [Orientation Slides](#)



* Additional Resources on MS Teams

MAKING IT OFFICIAL

Now that you have identified and recruited advisors that embody the characteristics you were looking for, they have completed their orientation, and fully understand their charge, it is time to officially appoint those Veteran patients and/or family members.

Sending an appointment or acceptance letter to your selectees provides excitement about their role as an advisor and serving their fellow veterans. It also outlines certain terms and conditions of the position, provides instruction of next steps, provides contact information and formally marks the implementation of the patient advisory council.

Making it Official Resources*

- [PFCC Appointment Letter](#)
- [Board Member Appointment Letter](#)
- [VFAC Committee Invitation Letter](#)



* Additional Resources on MS Teams

DEVELOPING A CHARTER OR POLICY

A charter or policy statement provides direction to the group and legitimizes its existence and scope in the medical facility. A charter/policy may also serve as an educational tool for staff and other committees, to better understand the purpose and scope of the council/board.

Key Decisions include:

- What will be the scope, authority, and function of the Council?
- What will be the purpose and objectives of the Council?
- How will it support the strategic plan and/or other facility initiatives?
- How will advisors be selected?
- How often should the council meet?

These questions and more will help develop components of the charter or policy statement. Although, some sections may vary by facility, the following sections are beneficial to include:

- Purpose
- Objective/Mission
- Reporting Structure
- Membership (voting / non-voting members)
- Role and Responsibilities of Members
- Meeting Time

MEETINGS

What an exciting time; all the pre-work that has been done to get to this point. During the first meeting (or during the orientation) the Medical Center Director may address the group and provide his/her vision for the group's involvement and overall engagement. Re-emphasize VHA's number one strategic goal of personalized, proactive, patient driven health care and the OPCC&CT model of patient centered care. Address the goals and objectives of the group, review the charter and set ongoing expectations for meetings.



It may take longer than anticipated for each member to establish a comfort level. It's critical to create an environment of trust and professionalism. Develop group norms and ground rules together to create cohesion in the Council.

- Consider providing light refreshments for the members at each meeting.
- Courtesy reminder calls and/or emails may promote maximum participation.

Charter Resources*

- [Veteran and Family Advisory Committee Charter](#)
- [VFAC Mission Statement & Charter](#)



* Additional Resources on MS Teams

SETTING THE AGENDA

Each meeting should have a prepared agenda that will guide the discussion of the meeting. The first meeting, of course, will have more introductory information. All proceeding meetings should have a set time for recap of the previous meeting. This can be done by review of the meeting minutes or brief verbal update. There should also be a section to address council issues and important calendar dates.

One approach is to invite staff to utilize the experience and knowledge of the advisors to provide feedback on specific projects or initiatives. A request may be submitted in advance and the staff person can describe the project, what they are looking for from the advisors and what they wish to take away from the meeting. Outcomes from the meetings are important to share with Council members.

Meetings Resources*

- [Feedback Request Form](#)
- [Sample Agenda](#)
- [Preparing staff to attend a VFAC Meeting](#)



* Additional Resources on MS Teams

SKILL DEVELOPMENT

The learning curve for advisors may be a significant one. Taking into consideration that many of the advisors may have no professional work history in health care; therefore be aware of medical jargon, acronyms, and assumptions about their understanding of the medical system. Incidentally, the medical facility is also experiencing a learning curve in embracing this new way of engaging with Veterans and family members. Plan for on-going training to increase the knowledge and skills of advisors and staff to partner together in a new way to effectively meet the needs of the facility and advance patient and family centered care.

Skill Development Resources*

- [Advisor Training and Development](#)



* Additional Resources on MS Teams

ADVANCED ADVISORS

As the skill level of advisors increase, the comfort level and demand to have them serve on medical center committees independent of the council meetings may increase. Advisors may be prepared to serve as active members of a hospital-wide committee or improvement effort. It is important for Advisors to be supported in this role and report back to the main council on the type of work being done outside of the Council.

As VA embarks upon its journey of patient-centered care, it is important to incorporate the Voice of the Veteran on every committee deemed appropriate at the discretion of the Medical Center:

Examples of committees or workgroups Advisors may serve on:

- Customer Service Committee
- Whole Health Committee
- Ethics Committee
- Women's Health Committee
- Quality Management (Falls Workgroup, Patient Safety, workgroups)
- Environmental Rounds
- Veteran Experience / Engagement Council

**Optional Strategy*

You may choose to have advisors, upon completion of their orientation, begin to work immediately on the medical center committee. Care needs to be taken to sufficiently support the Advisor in this role and prepare staff for Advisor participation. This is another approach to incorporating the voice of the veteran.

Advanced Advisors Resources*

- [Serving on Committees](#)
- [Enhancing Veteran Engagement for Whole Health Staff Selection](#)



* Additional Resources on MS Teams

MAINTAINING MOMENTUM / MEASUREMENTS OF SUCCESS

Maintaining momentum is critical to the success of an advisory program. Document, measure and share accomplishments so Advisors can see the impact of their contributions over a period of time.

Develop ways to recognize the hard work of the advisors and celebrate successes in positive ways. With any new program, don't be afraid to try something new.

Align efforts with organizational and strategic priorities and recognize staff involvement.

TERMS OF MEMBERSHIP

Determine how long advisors will serve on the council. Some facilities choose term limits, while others do not. Think about the goals/purpose of the Council to decide what option to choose.

It's advised that each member serve at least one year. Previous members can be invited to return back for another term. Consider how recruitment will be affected by the option selection. Term limits will require continuous recruitment to ensure a larger diverse pool of advisors reflective of the medical center population on an on-going basis. Some Advisors may choose not to commit to another full year of service, or life's priorities may change.

Regardless of term limits, consider what guidelines will be put in place to handle Advisors that may be ineffective, or disruptive. Consider how group process issues will be resolved. Identifying clear expectations for the role and responsibilities of an Advisor are helpful. Some facilities may choose not to invite a Council member back for another term or year of service.

SURVEY ACTIVE ADVISORS/INTERVIEW EXITING MEMBERS

Annual or bi-annual feedback from active Advisors can strengthen the Advisory Council. When a member's term has expired or the Advisor chooses not to continue to serve, it's also beneficial to capture his/her feedback about the experience. Find out what they learned and what advice they would offer for improvement. Exit interview questions can be very broad or specific to an area in which the advisor worked. These surveys/interviews can be helpful to better understand the impact and success of the overall Patient Advisor Program at your facility.

ASSESSING THE OVERALL PROGRAM

Measure accomplishments on an annual basis and share these with the Council and leadership. It's gratifying for the advisors to see the impact they have had over a course of one year. Documenting the advisors involvement in any medical center projects and initiatives is key to ensuring the continued sustainment and engagement of advisors. It also provides a mechanism to identify successes. Evaluation methods could be in both process and outcome measures.



Some **process** measures may include the following:

- Number of project teams that include patients as team members
- Number of patients that have been included on project teams
- Number of meetings in which patients participated
- Number of patients on the advisory council
- Number of interventions, tools, and materials created or reviewed by the council to meet project goals and objectives

Some **outcome** measures may include the following:

- Evaluation scores from advisory board meetings that meet or exceed the target
- Impact of implemented projects on patient behaviors and practices, measured through surveys, observations and/ or chart reviews
- Patient satisfaction results
- Employee satisfaction results

Maintaining Momentum / Measurements of Success Resources*

- [Sample Rejection Letter](#)
- [Sample Exit Interview Letter](#)
- [Sample of Advisory Council Highlights](#)
- [Sample Reports for leadership](#)



* Additional Resources on MS Teams

ADDITIONAL ADVISORY COUNCIL RESOURCES

- The MS Teams team has been set up and designed for collaboration of all VA employees/facilities looking for resources and support in their PFAC efforts. Please join the team: [VHA Veteran and Family Advisory Councils](#)
- [“Partnering with Patients and Families to Enhance Safety & Quality-A Mini Toolkit”](#), Institute for Patient-and Family-Centered Care.
- [“Partnering with Patients and Families to Design a Patient and Family-Centered Health Care System”](#), Institute for Patient-and Family-Centered Care in collaboration with Institute for Healthcare Improvement, April 2008.
- [“Achieving an Exceptional Patient & Family Experience of Inpatient Hospital Care”](#), Balik, Barbara, et. al. Institute for Healthcare Improvement, 2011.
- [“Guide to Patient and Family Engagement in Hospital Quality & Safety, Strategy 1: Working With Patients & Families as Advisors”](#), Agency for Healthcare Research and Quality (AHRQ).
- [“Guide to Patient & Family Engagement: Environmental Scan Report”](#), Prepared by American Institutes for Research, Maurer, Maureen, et. al., May, 2012, AHRQ.
- ["Increasing Veteran and Family Engagement in Research"](#), Health Services Research and Development, Chang/Runnels, May 2022. VA HSR&D
- [VA VetResources Community Network - Resources and Tools](#), Veteran Experience Office, 2023
- [Engaging Veteran Service Organizations](#), VHA Office of Healthcare Innovation and Learning, 2023

POINT OF CONTACT:

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 - Innovation Network's [Diffusion of Excellence Marketplace](#)

