



PLANETREE SERVICES

ASSESSMENTS

Community Design Assessment

This process was developed to aid healthcare organizations in taking the “pulse” of their community prior to the start of capital improvement projects. A series of focus group sessions are conducted with key patient and family community and staff stakeholders identified by the facility to help guide design development efforts. This effort is an excellent way for organizations to develop their concepts and Healing Environment teams to ensure prioritization of Patient-Preferred Practices™ and that human-centered supportive measures take center stage in the design for the environment of care.

Designation Assessment

This is a required on-site assessment for any organization seeking formal recognition for patient-centered excellence through the Planetree Designation Program. Conducted after submission of the Designation Self-Assessment, this assessment validates effective fulfillment of each of the 50+ designation criteria.

Enterprise Wide Pathways Improvement Assessment

An engagement with an executive leadership team focusing on completing an organization-wide service analysis to prioritize areas of need and in performance improvement. Planetree's expert advisors systematically help to guide and coach this process through the use of existing organization performance data and PC-PI gap analysis tools to determine the departments or service lines where improvement efforts will provide the greatest return on investment. Additionally, this engagement type includes an orientation on how to use Planetree's Patient-Centered Quality Filter™ for measuring improvement effectiveness over time, instituting an organization wide Patient Centered-Performance Improvement Management System, as well as education on strategies and tools used for sustainment in a successful patient-centered performance transformation.

Environment of Care Analysis and Component Mapping

This service focuses on reviewing existing onsite characteristics or construction documents and their ability to sustain positive patient and family experiences of care and staff supportive workplaces. Onsite intelligence gathering and/or plan review is compared to all Planetree components of care and evidence-based practices to identify methods for developing and leveraging an environment of care that meets organizational Healing Environment objectives. The purpose of this effort is to generate strategic and facility-tailored recommendations in a comprehensive report to inform functional programs for ongoing planning and facility operation.

Health Literacy Assessment

Simply put, care cannot be patient-centered unless it is delivered in ways that are understandable to patients and family members, and beneficial to their health, longevity and quality of life. And yet, a sizeable proportion of healthcare consumers lack health literacy, defined by the Institute of Medicine as “the degree to which individuals have the capacity to obtain, process, and understand basic health information and services needed to make appropriate health decisions.” Addressing health literacy challenges must be a healthcare priority. Evidence demonstrates that poor literacy is a stronger predictor of a person's health than age, income, employment status, education level and race. What's more, low health literacy is linked to higher risk of death and more emergency room visits and hospitalizations. This assessment gauges your organization's capacity to cater to individuals



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with a range of health literacy levels. The process will uncover barriers, emphasize and leverage patient education strengths, and provide an action plan for initiating activities to meet the educational needs of those you serve.

Human Resources Assessment

This targeted audit of existing HR systems, tools and employee experience data provides a baseline understanding of the current work environment. It forms the basis for establishing goals and priorities around workforce development in a patient-centered care culture.

Organizational Assessment

Informed by the combination of focus groups, observation, interviews, tour and historical data, this baseline comprehensive culture audit highlights organizational successes and opportunities. This effort sets the pace and direction for strategic planning and implementation.

Patient Centered Care Quality Check

What do Medicare Shared Savings/ACO regulations, Patient Centered Medical Home standards, and Meaningful Use thresholds have in common? They all require the engagement of patients in their own health care, and have thus catapulted Patient and Family Engagement (PFE) to the top of many healthcare providers' priority lists. There exists today a plethora of potential engagement approaches, ideas, and activities for providers to choose from. Ensuring that your PFE strategies are the right ones, in the right place, at the right time is critical. Quality checking your PFE tactics will ensure that resources are dedicated to well-aligned undertakings that achieve demonstrable outcomes. This assessment is designed to guide organizations in quality checking their PFE strategies, and to move beyond the first steps of implementing these strategies to the more advanced work of establishing the structures, processes, practices and cultural underpinning that will make the strategies not only effective, but sustainable.

Staff Retreat Audit

An on-site appraisal of staff retreats, concluding with specific feedback and recommendations for fine-tuning retreat content and delivery.



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INFRASTRUCTURE DEVELOPMENT

Board of Directors Programming

This programming educates and engages board members in the patient-centered care implementation effort. A customized approach for personally connecting board members to the change vision is developed to suit the culture and needs of your organization.

Human Resources System Advancement

Encompassing employee recruitment, onboarding, training, retreats and succession planning, this offering examines specific opportunities to create HR systems and processes that reflect your organization's patient-centered culture.

Leadership Goal Development

A facilitated engagement for senior leaders designed to assist in the identification and development of common goals, expectations and practices needed for patient-centered care implementation. Through an open and interactive dialogue, this program builds commitment and direction, and is an important early step in setting a foundation of leadership commitment which has been identified as a key driver for success in transformational culture change.

Patient and Family Partnership Council Development

Whether your organization is embarking on the creation of a Patient and Family Partnership Council or Patient Partnership Council or looking to maximize the impact of an existing one, this coaching offering assists you in mapping your path for doing so. Details of essential elements of an effective council are shared along with strategies to gain and sustain momentum, and practical tools to get you started.

Patient-Centered Building and Operation Life Cycle Analysis

The purpose of Patient-Centered Building and Operation Life Cycle Analyses is to evaluate areas for innovation and determining methods to demonstrate quantifiable returns on investing in Healing Environment facility and building operation improvement efforts. This service creates a framework that facilitates adherence to Patient-Centered Master Planning Standards and organization sustainability goals. Additionally, this effort contributes to crafting messaging that communicates these initiatives so that community stakeholders are aware of the organization's commitment to building user health, and stewardship of local and regional resources.

Patient-Centered Committee Development

Appropriate for newly forming committees or committees needing to reenergize their process, this workshop equips your team with the knowledge needed to guide the organization's patient-centered care journey. Membership recruitment, committee charter development, and the use of data to drive change are covered.

Patient-Centered Transitions of Care

This facilitated workshop brings together representatives from across your local care continuum with the aims of relationship-building, identifying gaps that undermine smooth transitions of care and developing solutions for eliminating those gaps and improving care coordination.



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Shared Governance Development

Creating transparency and inclusion in an organization requires a process for hearing each voice, including the patient. This service provides organizations with the opportunity to create a Shared Governance model that will aid in creating transparent and inclusive decision making and communication within an organization, unit, or practice. Planetree, through focus groups and assessments, will assist in the creation of the design and function of the Shared Governance model and provide key stakeholders with the skills necessary to sustain the governance created.

Strategic Planning Support

An organization's strategic plan should not be separate from its care philosophy. Instead, it should be in lock step with a patient-centered approach. This session provides a thorough review of an organization's strategic plan through the lens of patient-centered care in order to align goals and refine operational approaches.

Team Development Coaching

This immersion program provides real-time guidance to teams on a current system or process of their choosing. Not only will the team solve their problem, they will develop new skills and understand how to interact and connect with colleagues. As a take away, the team will develop the knowledge to implement a model of inclusive decision making.



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SKILL BUILDING

Advanced Retreats- Developing a Culture of Ownership

Through a combination of didactic sessions, interactive group activities and self-reflection exercises, this workshop focuses on the link between the patient experience and customer service, as well as the important relationship between organizational identity and staff behavior. Participants leave with the ability to make practical application of the learning concepts and thus begin to engage a Culture of Ownership.

Bedside Shift Report Coaching

Bedside shift report entails more than re-locating where change of shift report occurs. Staff at the bedside must be coached to effectively leverage the change of location into an opportunity for engaging patients (and family members) in a way that drives quality and improves outcomes. And they must learn to do this in a way that is not so time consuming as to be untenable. This coaching offering, suitable both for organizations embarking on transitioning to bedside shift report as well as those seeking to advance an existing effort, includes observation of current shift report practices, identification of barriers and facilitators for effective transition to bedside shift report, collaborative development a customized action plan for implementation, and identification of metrics to track to promote sustainability.

Care for the Caregiver Program Development

It is a widely held belief that as your staff is cared for so will your patients be cared for. This service provides organizations a foundation to build successful programs that support staff in balancing work and life. Through the use of focus groups and stakeholder interviews, Planetree will assist in establishing a committee that responds to the needs of the employees by the creation of meaningful programs that meet the needs of the employees. This committee will continue to drive meaningful engagement of employees and provide opportunities for the staff to feel cared for by the organization.

Care Partner Program Coaching

A hallmark Planetree practice, Care Partner Programs promote a heightened and formalized level of family participation in their loved one's health care. Identified by the patient, the Care Partner is typically a family member or close friend who is embraced as a member of the care team and accepts mutually agreed upon responsibilities. This coaching offering, suitable both for organizations embarking on the creation of a care partner program as well as those seeking to advance an existing effort, includes an assessment of existing strategies for family involvement, identification of barriers and facilitators for success, collaborative development a customized action plan for implementing a new (or revitalized) Care Partner program, and identification of metrics to track to promote sustainability.

Community Planning Charrette Session Facilitation

A Charrette is a participatory design process used to find a solution to a planning challenge. It brings together patient, family, and staff stakeholders from different disciplines and backgrounds to explore and evaluate project priorities and collaborate in developing plans for moving forward. Notes and documentation generated from this engagement can be viewed as an informational overlay or amendment to design development documents, to ensure that planning efforts coincide with Healing Environment initiatives as well as providing evidence that stakeholders from across the organization are actively involved in informing design of the environment of care.



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Compassionate Interactions Coaching

Good intentions are not sufficient for delivering care that patients experience as compassionate. Drawing on focus group data, satisfaction data, and input from the Stamford Hospital Patient and Family Advisory Council (PFAC), this educational series is designed to equip healthcare providers at all levels with the skills necessary to convert good intentions into measurable improvements. Each module builds on previous content, working as a cohesive curriculum to enhance participants' ability to communicate effectively, authentically, and compassionately with patients, family members, and each other.

Coordinator Orientation

This foundational training prepares staff charged with coordinating patient-centered care implementation efforts to successfully fulfill their roles. The training includes an orientation to Planetree resources, experiential exercises, practical tips for troubleshooting common challenges, mentorship from experienced coordinators and networking opportunities with peers.

Critical Conversation Training

This staff-level workshop provides practical strategies for creating and sustaining trust, fostering crucial and clear conversations.

Dementia Care Coaching

This session debunks the myth that individuals with dementia lack the ability to participate in choices related to their care. Instead, staff is trained on how to facilitate appropriate approaches that keep the individual at the core of their care process, while enhancing the experience for caregiver, family, and patient.

HCAHPS Improvement

A targeted, multi-user, unit-based evaluation to identify factors that influence patient survey responses, levers for improvement and solutions for enhancing the patient experience.

Leadership Retreat

A customized leadership workshop prepares and inspires leaders as agents of change who motivate staff and serve as continuous champions in order to sustain momentum. Executive leaders establish common goals, expectations and practices essential to Planetree implementation using best practices from high-achieving Planetree affiliates.

Medical Staff Programming

This programming educates and engages medical staff members in the patient-centered care implementation effort. A customized approach for personally connecting clinicians to the change vision is developed to suit the culture and needs of your organization.

Middle Manager Coaching

This series of trainings provides middle managers with the tools necessary to lead from a relationship-based model of supervision. Middle managers are often the most overlooked or neglected group of supervisors in an organization, but often the glue that binds culture change. This training is a key catalyst to meaningful change in your organization.



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Patient Centered End of Life Care

End-of-life care is an inevitable but often avoided part of our health care system. For decades death has been treated as one more task that needed to be completed by the staff. This program is designed to educate staff, identify preferences related to illness and end-of-life, create specific practices that support all stakeholders, and design programs that support staff and families in an ongoing manner.

Patient Preference Passport Program Implementation

The Patient Preferences Passport Program was developed by Planetree to support everyone who interacts with the healthcare system to utilize the Patient Preferences Passport as a crucial strategy for engaging with patients and family members in a much richer, deeper and more intentional way. The tool, on its own, however, will not engage patients and family members as active members of their healthcare team. This service provides organizations across the continuum with the experiential education and process development to include this tool in their practice. This program also creates Passport Facilitators that will be equipped with the skills needed to assist patients in identifying preferences and initiating the conversation with their physician or other healthcare provider.

Patient-Centered Finance

This training orients financial executives to how the philosophy of patient-centered care ties to the bottom line. In addition patient-friendly billing approaches are presented.

Patient-Centered Performance Improvement Certification Training

A learning and certification track instrumental for building internal subject matter expertise for developing and sustaining organizational improvement efforts. This tiered training is a combination of didactic education based on using and applying PC-PI approaches. It also provides hands-on experience of quality management tools to improve work processes and delivery of care efficiency and effectiveness while simultaneously enhancing the patient/resident, family, and caregiver's experiences of care.

Patient-Centered Performance Improvement Design and Transition Planning

Deployment of tools and processes for improving the patient experience, optimizing work flows, reducing rework and defects and increasing financial returns, all while activating patients as partners in their care and getting the caregiver back to the bedside where value is added.

Physician Retreat

Designed to reinforce all stakeholders' personal connections to the culture change vision, this modified retreat format is customized to meet the specific culture and needs of physicians and other providers.

Shared Decision Making Implementation

Shared decision making is supported by a growing body of research showing its beneficial effects on patient outcomes and healthcare costs, and yet many clinicians remain uncertain of what shared decision making really is and what it takes to do well. This workshop provides participants with a core understanding of the relationship between patient engagement and clinical practice, with an emphasis on shared decision making as a powerful patient engagement strategy. The offering covers the fundamentals of shared decision making, including communication and coaching skills to support patients in decision-making; when it is appropriate to use decision aids, and techniques for helping patients interpret risk information.



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Shared Medical Record Coaching

Once treated as a classified document accessible only to healthcare professionals, today the medical record is increasingly being used as a patient engagement and education tool, proven to drive patient satisfaction and promote improved outcomes. Still, old habits die hard, and adoption of a shared medical record policy may elicit a range of questions and concerns from physicians, IT staff, nurses, privacy officers and others. This coaching offering, suitable both for organizations embarking on shared medical records as well as those seeking to advance an existing effort, includes observation of current practices, identification of barriers and facilitators for sharing the medical record, collaborative development a customized action plan for implementation, and identification of metrics to track to promote sustainability.

Staff Retreat Development and Facilitator Workshops

Retreats provide a unique experiential opportunity for engaging and sensitizing staff to the patient and family experience, while promoting relationship-building across departments and between organizational tiers. In these sessions, Planetree works collaboratively with your team to develop a consistent staff retreat format and curriculum and trains retreat facilitators.

Patient Directed Visitation Development

Cultivating a health care environment that welcomes loved ones and embraces family members' potential for enhancing high quality, coordinated and safe health care delivery is fundamental to patient-centered care. Research has found that flexible policies around visiting minimize anxiety and maximize comfort for patients and families, and yet restrictions on visiting persist in the majority of hospitals around the world. This coaching offering includes education on the difference between open visiting and patient-directed visiting, identification of strategies for managing common visitation challenges, support in policy development, and a communications and environmental audit to ensure coherence between policy and practice.