



# Patient & Family Engagement in Obstetric & Neonatal Health

## Implementation Checklist

### Preparation

- Begin building relationships with potential patient and family partners/organizations

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- Obtain buy-in from executive-level leadership for patient family advisor project integration

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- Designate a staff leader/liaison responsible for patient family engagement; consider recruiting a project team that includes administration & provider champions

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- Making the Case: Educate staff and care providers on patient/family engagement

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- Assess Readiness: Conduct unit assessment to determine attitudes, gather useful information for engaging patient family partners, and appraise existing and needed supports/infrastructure for effective engagement

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- Create a Project plan: Develop an action plan for your key goals including tasks/steps, person responsible, and timeline

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### Implementation

- Plan your OB and/or Neonatal specific Patient/Family Advisory Council: Determine size, structure, recruitment, retention of members, goals, meeting frequency, plans to build unit culture, and communication

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- Plan recruitment and training: create informational materials, determine selection criteria, create orientation goals and tools

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- Recruit and orient family advisors

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- Enact Change: Hold meetings, update documents, create resources, review policies. Include patient and family partners on your unit's safety and quality improvement project committees

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### Sustainability

- Support your Advisors: Track participation, do "temperature checks" to assess advisor satisfaction, and monitor alignment with role description

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- Report back: Track accomplishments, share/communicate progress, discuss challenges, and celebrate successes

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