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Best Practices for Identifying, Engaging, and Sustaining Family Advisors

Best Practices for

Identifying, Engaging, and Sustaining Family Advisors

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We would like to acknowledge with great thanks the contributors to this resource:

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    - Lise Trancede, Maine
- ASHEW Practice Level Family Advisors with special thanks to Darci Brosnan, Angelina Figueroa, and Sedara Owens for their contributions.
- California-1 Chapter, American Academy of Pediatrics
- Family Partnership Network, AAP
- Family Voices
- Georgia Chapter, American Academy of Pediatrics
- Indiana Chapter, American Academy of Pediatrics
- Institute For Patient- And Family-Centered Care
- Maine Chapter, American Academy of Pediatrics
- National Institute for Children's Health Quality
- Oregon Chapter, American Academy of Pediatrics
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Special thanks to Lauren Barone, Jamie Ciccone, Suzanne Dinsmore, Ryan Hassan, Megan Heavrin, Olamide Kolawole, Parisa Mansoori, Omoniyi Omotoso, Neel Patel, Eileen Reilly, Abby St. George, and Sarah Stelzner, for their contributions.

The Addressing Social Health and Early Childhood Wellness Change Package is generously funded by the JPB Foundation.

Family engagement is an integral approach to the planning, delivery, and evaluation of health care that is grounded in mutually beneficial partnerships among health care providers, patients, and families. Family advisors embedded in a pediatric practice can be the product of heightened family engagement.

Why might a practice engage a family advisor?

Pediatricians often talk with their patients about social drivers of health, infant and child mental health, and other complex and chronic health care needs. These conversations can be sensitive and raise questions around confidentiality, community referral services, health equity, and more. Family advisors can help practices address the best way these questions can be posed to families and develop solutions together. Their experiences and expertise make them the perfect partners to bridge the gap between community and clinical services.

When should your practice engage family advisors?

Engagement of families is necessary through all stages of healthcare to provide children the best possible care that equitably addresses their well-being and health.

1. Early Childhood Comprehensive System – CoIIN "Family Engagement Policy-DRAFT UPDATED 3-16-2021

Definition of Family Advisor/Parent/Caregiver[1]

The use of parent, family advisor, and caregiver refer to adults who have a primary role in caring for a child. It is important to broaden the definition of what a family unit can look like. This includes biological, adoptive, foster and stepparents, grandparents, other caregiving kin, and legal and informal guardians. It could also include parents who do not live with the child and are still involved in raising the child, thus have important perspectives as a parent. The chart[2] below shows how family advisors can be engaged in efforts to become a leader in this critical work:

Involvement

Parents participate in activities or programs once, or on a consistent basis. Primary goal is to build social capital and create connections and awareness.

Engagement

Parents collaborate in planning and implementation (ie social media campaigns, family advisory board, etc.). Systems engage family leaders in a more authentic manner.

Influence

Parent voice and experience informs decisions through tools like surveys, focus groups, and interviews. Parents are invested in the goals of the group.

Leadership

Parents are integral decision-makers and usually board members. Use their experience and expertise to effect change and actively lead initiatives. Policies, programs, and strategies are developed with family leaders from the beginning.

2. Early Childhood Comprehensive System – CoIIN "Family Engagement Policy-DRAFT UPDATED 3-16-2021

Value of Engaging Family Advisors for Practices and Patients

The relationship between families and their pediatrician is critical. These relationships can make a lifelong difference in child and family health. Meaningful patient and family engagement can help:

- Patients and families feel heard, understood, and respected
- Improve patient outcomes and lower health care costs[3]
- Strengthen the family's relationship with the clinical team and further embed the patient in the medical home
- Promotes family engagement and partnership for improved patient outcomes
- Show that the practice cares for the whole family and values their lived experiences

Family Advisors can support practices to:

- Examine, reach, and maintain practice's mission, vision, and value statements
- Be culturally responsive to the needs of the children and families served
- Support families to address concerns related to child health
- Address the unique needs of children with complex care needs and their families
- Improve and bridge communication between parents and providers
- Help identify and remove barriers to service
- Serve as a connection between families and clinical and community providers
- Identify practice changes that improve patient facing policies and procedures

Benefits for Both[4]	
Family Advisor	**Healthcare Professional**
• Lived experience is valued and acknowledged • Creates positive change for all children • Provides networking opportunities with other parents • Partnering with health care professionals • Learning new knowledge and skills • Being part of a team	• Family perspective • New and creative ideas • Gain cultural humility & understanding • Provides structure to have equity, diversity, and inclusion inform policy • Parent brings unique skill set (e.g., marketing director, novelist, teacher, artist, etc.) • Empowers families to invest in practice in a new way • Parent is a bridge to larger community networks/resources

"I love hearing a family opinion; sometimes it's so different from how we usually operate and gives us a chance to pause and reflect. She also has great resources and ideas she shares because she also uses them for her growing family and lives in our neighborhood, which allows us to share with others and our staff."

3. Johnson, BH, Abraham, MR. Partnering with Patients, Residents, and Families: A Resource for Leaders of Hospitals, Ambulatory Care Settings, and Long-Term Care Communities. Bethesda, MD: Institute for Patient- and Family-Centered Care; 2012.
4. I-SCRN PPT https://downloads.aap.org/DOCHW/ASHEWKD3.1.pdf

Common Worries of Engaging Family Advisors[5]

Engaging family advisors into a practice may be a new concept. Below are some common worries of engaging family advisor and how to overcome them.

Worries from the Medical Team	Worries from the Family Advisor
• Family Advisor will see our “dirty laundry” • HIPAA • Advisor will just complain • How to work around non-negotiables	• I’m not smart enough to provide input • Will providing my opinion affect the care my child receives • They do not really want me here, I am just a token that is required

How to Address Worries of Engaging Family Advisors

- Ground rules for all involved from the start
    - Cover non-negotiables which includes HIPAA
- Provide basic QI training and explain acronyms at the start – empowers everyone to participate
- Treat everyone as equally important team members – “no label at the table”
- Every person’s input is valuable
- Remember the “why” – this moves us away from focusing on the negative and moving forward

“Right from the start, we knew our patient population was predominantly Latinx and mostly 1st or 2nd generation immigrants. We engaged our Latinx female family advisor right from the first meeting and used her continual input to guide our screening process and questionnaire development then test piloted the screening tool and revised it based on initial patient/family feedback and our Latinx MAs, who often assist patient/families with completing most of our other screening tools.”

5. Kara Casavan, Indiana Chapter Family Advisor

Common Obstacles of Family Advisor Engagement and Strategies to Overcome Them

Below are common obstacles that can arise when engaging family advisors and strategies to overcome them.

"How do I get staff buy-in and support to engage family advisors?"

- Discuss the benefits to the practice of engaging family advisors
- As a team, complete the [Checklist For Attitudes About Patients and Families As Advisors]
- Have staff involvement in selection of family advisor

"I don't know how to identify appropriate family advisors for my practice."

- Review practice patient list
- Search local community organizations that already partner with your families
- Provide specific roles and expectations through development of a job description
- Partner with community organization to interview potential candidates
- Provide compensation for their time and expertise
- Connect with state AAP chapters for ideas
- In addition to word of mouth, broadcast message or post a job description with an open invitation

"Practice staff and family advisors are hesitant to speak openly about practice issues."

- Have everyone sign a confidentiality agreement
- Have chairperson clearly and openly explain expectations at start of meetings
- Have "No label at the table" meetings (e.g., no use of Dr. during meetings to make everyone feel equal)
- Provide adequate facilitation in meetings so there is bi-directional communication

"I don't know what to do with family advisors."

- Ask family advisors their interest areas and what improvements they believe the practice can make to improve patient outcomes
- Ask the practice staff what changes they want to make to improve patient outcomes and identify ways family advisors can help
- Review the Family Advisor Task Document, which lists a wide variety of tasks that family advisors can engage in, and identify areas of interest (see Appendix B)
- Allow families flexibility in their participation. Maybe they have a specific interest area where they can participate, but can't commit full-time
- Based on the above feedback, create a job description for family advisors with clear role, time commitment, and expectations (see Appendix A)

"How do I sustain family advisors?"

- Conduct family advisor training and orientation
- Have personal, individual outreach and regular touch base meetings with a staff mentor
- Provide financial compensation and be willing to be flexible with family needs
- Document and share the progress and successes of family advisors
- Have clear roles and time requirements so everyone knows what's expected of them and regularly reevaluate
- Identify opportunities within the practice to support continuous engagement
- If possible, create a role in the existing HR infrastructure to make family advisors sustainable

How to Identify, Recruit, and Sustain Family Advisors

How to Identify, Recruit, and Sustain Family Advisors

1. Develop Infrastructure for Supporting Family Advisors

a. Create consensus among practice members as to why you want to engage a family advisor

b. Examine your patient population and decide what makeup of family advisors would be representative

c. As a practice team, draft goals, timeline, expectations, sustainable compensation source and job description for family advisors (see Appendix A)

d. Select a staff member to be the mentor for the family advisor(s) for support and questions

2. Select Family Advisors

a. Promote the Position

b. Develop and spread promotional material such as emails and flyers (see Appendix C)

c. Review patient list, post message to patients, and search local community for potential candidates

d. Interview and select applicants

e. Finalize co-created goals, timeline, expectations, and job description with practice team and selected family advisors

3. Ensure Success with your Family Advisors

a. Provide training and orientation

b. Track, note, and share accomplishments

c. Formalize sustainable payment method for family advisors

d. Sustain staff mentor for family advisors

e. Regularly evaluate Family Advisor roles, expectations, etc.

1. Develop Infrastructure for Supporting Family Advisors

Shifting the Culture Within the Practice Team

Prior to recruiting, practice staff need to ensure the culture of their practice is ready to engage family advisors. First, practices need to understand the role and purpose of family advisors and ensure there is buy-in from all staff to support them on the practice team. Explore the benefits and value family advisors can add to improve patient outcomes. Also, practices should determine their needs and the expectations of the role family advisors will play. To do this, determine what local changes the practice wants to see to better support their patients and how family advisors can help reach that goal. To the right are steps and questions to consider before recruitment begins. Keep in mind, every time new staff is hired, they should be made aware of the goals and expectations of family advisors.

- Assess the readiness of the practice[6] to take on Family Advisors
  - Do all practice staff understand their role and expectations?
  - Do all practice staff see the value of engaging a family advisor?
  - Answer the following questions around staff and practice readiness using this resource.[7]
- Identify a staff person to be a mentor for family advisors. This will be the main contact that family advisors know to reach out to with questions, concerns, and ideas.
- Address and educate about implicit and explicit biases in practice staff (See: Learning Topic 2: Race and Ethnic Equity)
- Be culturally respectful, responsive, and aware
- Change the relationship between provider and parent – facilitate a partnership
- Remove tokenism
  - Do not add family advisors to practice team solely to check a box; have clear roles and expectations for them
  - Identify more than one family advisor to gain broader perspectives and reduce the expectation that "one family advisor speaks for all families"
  - Identify mechanisms to regularly engage family advisors as part of the team

6. https://www.ipfcc.org/resources/Checklist_for_Attitudes.pdf
7. https://www.nichq.org/sites/default/files/resource-file/Assessing_readiness_for_practices_and_staff-English.pdf

Characteristics of Family Advisors

Identifying family advisors can be a struggle. In addition to shifting the culture, mentioned above, reviewing as a practice team what type of person and what specific roles you want family advisors to do can help establish guidelines for identifying family advisors. To the right are some common characteristics and responsibilities of a family advisor.

While there is no one ideal family advisor, the following characteristics can be beneficial.

- Lived experiences
- Ability to present problems and offer solutions tactfully
- Empathetic
- Ability to say "No" and "I don't know"
- Desire to learn
- Emotional intelligence
- Knowledge of local resources and organizations in the community
- Has time and ability to fully participate (consider childcare, transportation, time of meetings or work)
- Ability to separate advocating for their child and advocating for all children

Responsibilities of Family Advisors

This is not an extensive or required list of responsibilities for a family advisor. The specific role should be developed based on the needs, experiences, and goals of both the practice and the family advisor. Consider areas in the practice to be improved upon and how a family advisor could help the practice reach their goals. For more information, please see the Examples of Family Advisor Tasks. (Appendix B)

- **Be a Liaison:** Facilitate questions and concerns between the families and the practice team
- **Share Your Story:** Share your health care experiences with providers and other patients and families.
- **Provide Input on Services:** Serve as a partner in projects working to make improvements to specific provider and clinic services.
- **Review Practice Environment and Materials:** Ensure office resources, policies, and programs represent the patient population and are equitable.
- **Engage Community Partners:** Develop and maintain positive relationships with community stakeholders and identify gaps in programming efforts and/or partnerships.
- **Expand Your Knowledge:** Develop knowledge and professional skills through continuing education, professional development, current literature, and seminars, etc.
- **Represent the Practice:** Be available to represent the practice as a family advisor and answer questions.
- **Participate on Committees:** Bring the patient and family perspective to committee meetings.
- **Participate on Quality Improvement (QI) Team:** See box on next page that outlines methods for family advisor engagement in QI work.

The Institute for Patient and Family-Centered Care (IPFCC)'s Framework for Family Involvement in QI and Classification.

- **Level I** Families complete surveys or engage in other evaluative activities as respondents (e.g., focus groups).
- **Level II** Family advisory councils serve as a resource to the quality improvement team (e.g., review projects, documents).
- **Level III** Families participate as occasional reviewers and consultants during an improvement project.
- **Level IV** Families participate as active members of improvement teams and/or may serve on unit-based task forces and committees and faculty for staff and clinician education.
- **Level V** Families are co-leaders of improvement initiatives: They are fully integrated as critical members of the QI team at all levels. They co-design and lead tests of change for staff education.

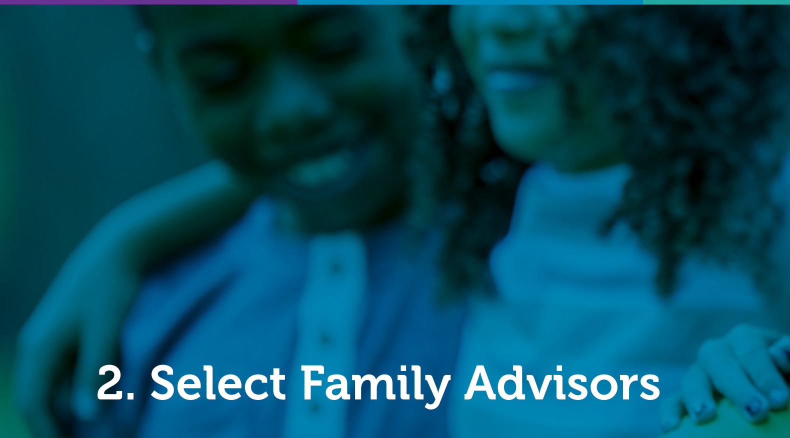
Job Description

To ensure there are clear and agreed upon expectations between the practice team and the family advisors, a job description (See Appendix A) should be developed. Together, practice staff and family advisors should identify areas the family advisor has an interest, establish their goals, abilities, and time commitment, and answer any questions or concerns. Through this conversation, a plan with a timeline can be developed. Family advisors should also be provided with optional training opportunities to advance their work.

Compensation

Compensation needs to be provided to show family advisors their time and expertise are valued. It is necessary for practices to be flexible and communicate the best way to compensate family advisors. For example, some family advisors may not feel comfortable receiving an IRS Form 1099 (for reporting taxable income) so offering other incentives for participation should be considered. Compensation could include:

- Stipend
- Gift cards
- Reimbursement for items such as parking, meals, childcare, travel, etc.
- Seek alternate sources of funding from within the practice and through community partners such as, local and institutional foundations



2. Select Family Advisors

Promote the Position

See Appendix C for an example of a letter inviting people to participate as family advisors and Appendix D for a family advisory panel's mission statement.

★ ***Tip:*** *If you serve a diverse family population and are encountering language barriers in meetings: Zoom offers interpreter services during meetings. They can do multiple languages at one time.*

★ ***Tip:*** *Allow families flexibility in their participation. They may have a specific interest area where they can participate but can't commit full-time.*

- Ask involved patients of your practice to participate
- Ask providers to identify potential candidates
- Hand out, email, and post flyers in your office in appropriate languages
- Post the position information on your office website
- Connect with community organizations that are already working with your families, including cultural and religious organizations
- Connect with family-driven organizations in your community (such as: Parent2Parent, MOMS Rising, etc. that families utilize and trust) and Title V and Family-to-Family Health Information Centers
- Consider their readiness (Select parents who are far enough along in their journey to be a resource to other families, be objective, and offer broad family perspectives)

Questions to ask During Interviews[8]

- **Story:** What's your family story? What in your life brought you here today? (Discover ability to connect personal story to larger context.)
- **Hope:** What motivates you to act to improve our practice? What's your vision of how things could be different if we worked together? (Discover shared values.)
- **Leadership Resources:** What skills do you have? How do you lead others already in your life? What would you be willing to bring to this work? (Discover leadership and collaborative skills.)
- **Challenges:** What challenges do you foresee that may prevent you from meaningfully contributing to improvement work in our medical home? (Discover barriers to participation.)
- **Career Development:** What are you hoping to gain from being a family advisor? What can we do for you to make the experience meaningful?

8. https://nichq.org/sites/default/files/resource-file/Sample_questions_for_meeting_with_interested_Family_Health-English.pdf

3. Ensure Success with Your Family Advisors

Provide Family Advisors with Training and Orientation to the Practice[9]

To the right are potential topic areas to include in a family advisor orientation to ensure there is understanding of the practice staff, office, and workflow as well as the roles and expectations of a family advisor.

- Participant introductions
- The organization's history, mission, and values
- Overview of facilities and services
- Brief presentations by administrators or other key persons
- Brief presentations by current family advisor(s), if applicable
- Roles and responsibilities of family advisor mentor, family advisors, and staff members
- HIPAA and expectations for honoring privacy and confidentiality
- Overview of a typical meeting structure — minutes, committee reports, typical agenda
- Practical details — where to park, what to wear, what to bring to meetings
- Attendance expectations
- Specific skills and knowledge needed to be an effective team member (e.g., quality improvement methodology for those serving on a quality improvement team)
- Jargon 101. While it is best to reduce the amount of jargon used, sometimes it is impossible to completely eliminate it. If there are terms that will be used frequently in meetings, make sure family advisors understand them. Providers should also be willing and ready to understand the communication style of family advisors
- Training for any technologies that will be used (e.g., conference calls, web-based tools)

9. https://www.ipfcc.org/resources/A_Patient_and_Family_Advisory_Council_Workplan_Getting_Started.pdf?v1, pg 6

"The parent that is an hourly employee and does not get paid if they don't work won't be a candidate for family advisor work unless reimbursement meets or exceeds the lost income or the practices can work around their schedules. In addition, families that don't have extra money for childcare may not have the capacity to participate in this work as well. Practices serious about diversifying their family advisor pool will need to be willing to meet with parents after hours, on weekends, or virtually."

– Julie Cullifer, Family Advisor

"One of our biggest challenges was scheduling times for the entire team to meet that also worked for the family advisor. It might be helpful to establish beforehand exactly when meetings will be and that the clinic be prepared to adjust meeting times as needed to accommodate busy parents who might also be working in the day."

– Ryan Hassan, MD, MPH
Clackamas & Oregon Pediatrics

Track and Celebrate Successes of Family Advisors[10]

How will you track your family advisor accomplishments?

- Minutes
- Specific goals defined and achieved
- Outcomes and impact of activities
- Agenda planning with clear closure and transition at the end of each meeting
- Attendance at meetings
- Family Advisor Annual Report
- Use structured tool to evaluate progress annually, such as the Family Engagement in Systems Assessment Tool (FESAT) from Family Voices

Celebrating success is a way to sustain family advisors

- Share accomplishments and changes based on family advisor feedback in team meetings, social media, emails, etc.
- Celebratory and acknowledgement activities should be provided with genuine feeling, appreciation, and be meaningful to individuals involved
- Small gift at the end of a member's term
- Annual celebration

Evaluate Engagement

Below are options for practice teams to use in partnership with family advisors. Select a tool that works for your practice. This should be done on a regular basis to ensure everyone is in agreement on progress and best practices.

- Family Engagement in Systems Assessment Tools (FESAT) from Family Voices
- Checklist for Involving Families from National Institute for Children's Health Quality

10. https://www.ipfcc.org/resources/A_Patient_and_Family_Advisory_Council_Workplan_Getting_Started.pdf?v1, pg 7

Success Stories of Engaging Family Advisors

Creating a Family Advisor Panel

By Darci Brosnan from Children’s Heath Health Associates of Salem, Oregon

While there was a parent advisory group 3-4 years ago, it was physician led. From that collaborative came the idea to have a parent lead the group and increase number of parents involved. Physicians and medical assistants both nominated parents who they thought would be good participants. Darci Brosnan volunteered as lead family advisor and acts as the liaison between the family advisor panel and the practice. Brosnan emailed the identified parents about the group, the goals, and to ask if they were interested in participating (see Appendix C). They were able to secure 13 family advisors who attend meetings every 3 months to keep them informed of what is happening at the clinic, any changes that have been made based on their feedback, and to share new suggestions.

Tips for a successful family advisor group from Children’s Health Associates of Salem:

- Clarify the role of family advisor. “Advocate” in some practices can be a well-defined term that already has definitions and requirements so be sure to have the practice think about their goals of engaging family advisors.
- Provide training for all family advisors.
- When selecting possible family advisors, keep in mind that a good family advisor can take their experience and apply it to a broader context for all patients. They aren’t working just for themselves; they’re working for all patients.
- While the practitioner attends every meeting, they eventually leave to give the family advisors a space to speak more freely about any suggestions and questions they may have.
- When the meetings are in person, the practice provides food and a $25 gift card for every member who attends. If parents can’t attend in person, there is the option to join virtually.
- The lead family advisor was given an ID badge to make her feel like part of the team and feel valued.
- The lead family advisor was invited to the clinic a few times to check in with families after their appointments (if desired) so that she could let the patients know the group existed but also to discuss clinic workflows with the patients.

Bridging the Gap between the Practice and the Community

By Angelina Figueroa from Lifelong, California

After moving to Oakland from Los Angeles, Angelina Figueroa needed to learn how to navigate a new city and find resources for herself and her three children. While at a doctor's visit at Lifelong, staff mentioned the family advisor position that was available and recommended her for the role. Because of the work she had already done in identifying valuable resources for herself, she was able to share those with the practice, and in turn, with the patients. Because she was new to the area, she understood the struggle of "where do I start?" when trying to identify resources for families and was able to bridge the gap between the practice and the local community.

Angelina was invited to group meetings and met monthly, one-on-one, with Dr. Omotoso to stay up to date on what was happening at the practice and what changes were being made based on her feedback.

As Lifelong's family advisor, Angelina:

- Helped translate forms and screeners into Spanish to ensure they were meeting the needs of their patient population.
- Reviewed patient-facing material to provide feedback on how patients may respond to the questions and offered suggestions on how to make them feel more comfortable completing the forms.
- Was a trusted resource when patients had questions but may be hesitant to ask due to language barriers and/or immigration status.
- Highlighted that if the practice was going to ask personal questions and refer patients to resources, it was vital they follow up with families on those referrals to ensure their needs were met. She didn't want families to feel they had shared sensitive information, but nothing was going to come from it.
- As a first-time family advisor, Angelina felt the experience was mutually beneficial. She believed her expertise was appreciated at the practice and she was able to learn even more about social drivers of health and how to help families overcome some of those challenges.

Recommendations to Improve Screening Process

By Sedara Owens from 38th St., Indiana

As the family advisor, Sedara Owens provided 38th St. feedback on how to improve the screening process for their patients. She was able to provide the practice a new, outside perspective on how families experience the process and how to make it a more comfortable, successful visit.

Below are the three recommendations that were implemented:

- Develop an introduction to help discuss with the patient why they are being asked to complete the screen.
- Ask open ended questions during conversations with the patient instead of solely relying on questioners. Open-ended questions can come across more authentic and may yield more honest responses.
- Have the medical assistants collect responses while they are doing the initial check in. This allows them time to take the answers back to the office and gather the necessary resources that can be given to the patients at the conclusion of their visit.

"It [engaging a family advisor] made us more confident about using the Spanish-language versions of the Edinburgh [Postnatal Depression Scale (EPDS)] [and] ASQ. It also kept us grounded regarding what it's really like to be a parent waiting to hear from various referral agencies and struggling to connect."

Appendix

Appendix A / Sample Job Descriptions

Family Advisor Job Description (Sample 1)

Community Liaison Focus

Description: The Family Advisor plays an important role in bringing together local partners to ensure families, childcare providers, family service providers, and health care professionals work together to address challenges that impact early childhood. The Family Advisor works to ensure families have access to the resources necessary to promote wellness and work to develop positive, equitable care within [*name of practice*].

[***Note****: The responsibilities listed below are examples only. Edit to fit the agreed upon needs and capacity of the family advisor(s) and practice staff*]

Summary of Responsibilities:

- Helps create successful community engagement strategies to improve the health and developmental progress of all children birth through age 5 at [*name of practice*]
- Provides their experience and knowledge in guiding the development of policies, programs, and services that best address the needs of [*practice name*] youngest patients.
- Work with stakeholders, neighbors, and community partners to help create an environment where all children succeed.

Responsibilities:

- Be a liaison: Facilitate questions and concerns between the families and the practice team.
- Share your Experience: Share your health care experiences with providers, patients, and families.
- Provide Input on Services: Be a partner in projects working to make improvements to specific provider and clinic services.
- Review Practice Environment and Materials: Ensure office resources, policies, and programs represent the patient population and are equitable.
- Engage Community Partners: Develop and maintain positive relationships with community stakeholders and identify gaps in programming efforts and/or partnerships.
- Expand Your Knowledge: Develop knowledge and professional skills through continuing education, professional development, current literature, and seminars, etc.
- Represent the Clinic/Practice: Be available to represent the organization as a family advisor and answer questions. Recognize the importance of your role and the fact that your voice represents the voice of many.
- Participate on Committees: Bring the patient and family perspective to committee meetings.

Qualifications:

- Must be a caregiver (biological parent, kinship caregiver, foster parent, adoptive parent, grandparent, or other caregiver role) of a child or young adult at [*practice name*].
- Has experience navigating child-serving systems such as health care, mental health, education, child welfare, family service providers, and/or other applicable early childhood organizations.
- Has knowledge of a wide array of community organizations, resources, and demographics.
- Has the ability to build and maintain relationships with multiple, diverse parties including families, program partners, state and local leaders, and staff.
- Has the ability to work independently and in a team environment.
- Has the ability to be warm, welcoming, and engaging with diverse families and partners.
- Willingness to present problems and suggest solutions.
- Desire to learn.

Time Commitment: [*To be filled in by practice*] **Note**: The responsibilities can occur as needed and time commitment may vary. It does not need to add up to a full-time position. To further clarify time expectations, include potential time commitments. [*The below are examples only. Please edit to fit your needs*.]

- Commit to be a family advisor for at least 1 year.
- Attend orientation, 1.5 hours.
- Attend 1-hour training at least once per year.
- Attend monthly team meetings, 1 hour each.

Practice Mission: [*to be filled in by practice*]

Compensation and Benefits: [*to be filled in by practice*]

- Salary/Wages: [*to be filled in by practice*]
- Other Benefits: [to be filled in by practice]

Family Advisor Job Description (Sample 2)

Quality Improvement Focus

Description: The Family Advisor helps implement quality improvement (QI) strategies and ensures the office environment is equitable and reflective of the population served to improve the health and developmental progress of all children birth through age 5 at [*name of practice*]. Alongside [*supporting staff names and titles*], the Family Advisor will provide their experience and knowledge in guiding the development of policies, programs, and services that best address the needs of [*practice name*] youngest patients. Level setting on QI practices and terminology will be taught under the expand family advisors' knowledge and capacity.

[***Note****: The responsibilities listed below are examples only. Edit to fit the agreed upon needs and capacity of the family advisor(s) and practice staff*]

Summary of Responsibilities:

- Ensure practice environment, policies, and programs are equitable and reflect the population served
- Participate in the development, refinement, and implementation of quality improvement strategies to improve the care of children birth to 5.
- Ensure families have access to the resources necessary to promote wellness and work to develop positive, equitable care within the practice.
- Attend and contribute to team meetings

Responsibilities:

- Provide Input on Services: Be a partner in projects working to make improvements to specific provider and clinic services.
- Review Practice Environment and Materials: Ensure office resources, policies, and programs represent the patient population and are equitable.
- Implement quality improvement strategies: Work alongside practice staff to identify, test, and implement quality improvement strategies.
- Participate in Meetings: Bring the patient and family perspective to meetings.
- Be a liaison: Facilitate questions and concerns between the families and the practice team.
- Share your Experience: Share your health care experiences with providers, patients, and families.
- Expand Your Knowledge: Develop knowledge and professional skills through continuing education, professional development, current literature, and seminars, etc.

- Represent the Clinic/Practice: Be available to represent the organization as a family advisor and answer questions. Recognize the importance of your role and the fact that your voice represents the voice of many.

Qualifications:

- Must be a caregiver (biological parent, kinship caregiver, foster parent, adoptive parent, grandparent, or other caregiver role) of a child or young adult at [*practice name*].
- Has experience navigating child-serving systems such as health care, mental health, education, child welfare, family service providers, and/or other applicable early childhood organizations.
- Has knowledge of the community organizations, resources, and demographics and willing to seek out new resources and community organizations that may be useful for helping families.
- Has the ability to build and maintain relationships with multiple, diverse parties including families, program partners, state and local leaders, and staff.
- Has the ability to work independently and in a team environment.
- Has the ability be warm, welcoming, and engaging with diverse families and partners.
- Willingness to present problems and offer solutions.
- Desire to learn.

Time Commitment: [*To be filled in by practice*] **Note**: The responsibilities can occur as needed and time commitment may vary. It does not need to add up to a full-time position. To further clarify time expectations, include potential time commitments. [*The below are examples only. Please edit to fit your needs*.]

- Commit to be a family advisor for at least 1 year.
- Attend orientation, 1.5 hours.
- Attend 1-hour training at least once per year.
- Attend monthly team meetings, 1 hour each.

Practice Mission: [*to be filled in by practice*]

Compensation and Benefits: [*to be filled in by practice*]

- Salary/Wages: [*to be filled in by practice*]
- Other Benefits: [*to be filled in by practice*]

Appendix B / Examples of Family Advisor Tasks

Beginner Tasks

Office Environment

- Provide a family point of view about the building and staff:
  - Do members of the care team represent the population served?
  - Do staff smile when greeting families?
  - Can the language be revised to be more equitable and family friendly?

Patient Facing Resources

- Review posters, books, surveys, handouts, etc. in the office to ensure they represent population served.
- Review practice website for feedback
- Have a family voice in newsletter, blog, social media, or other materials.

Policies and Activities

- Make sure internal policies and activities equitable. For example, does the late policy support families who may not have transportation?
- Seek parent input when talking about issues that come up during the year.
- Create and regularly use a family feedback survey.

Meetings and Trainings

- Help plan and develop internal meeting agendas.
- Act as a member of Executive Committee/Board of Directors and attend meetings and retreats.
- Attend clinic trainings and webinars.

Intermediate Tasks

- Work with outside organizations
- Help build community partnerships with clear activities and rules.
- Work with groups such as:
  - Everytown
  - Family Voices
  - Federation of Families
  - Local government
  - Local parent groups
  - Moms Demand Action
  - National Alliance on Mental Illness
  - Community Impact Partners
  - Fathers' Network
  - Parent to Parent USA
  - Parent Teacher Association
  - State Family to Family Health Information Center
  - Statewide Parent Advocacy Network
  - Voices for Children

Policies and Activities

- Include family voices into quality improvement programs.
- Include families in the budget, planning, completion, and review of a project.
- Help care team members better understand the value of screening during well-child visits.

- Learn about parents' experiences and needs as it relates to racial/economic differences in health care.
- Learn from parents about the importance of cultural humilitywhen providing care.
- Engage with special parenting populations, like foster parents, to learn about their needs.

AAP Chapter Related

- Provide leadership roles in Chapter's Mental Health Access Program.
- Attend yearly chapter meetings and present updates and any concerns.
- Conferences, Education, and Advocacy
- Partner with parent advocate groups on programs, such as Adverse Childhood Experiences (ACEs) projects, mental health workgroups, and gun violence prevention.
- Hold community meetings with familieswho have complex health care needs.
- Share commentsfrom community meetingswith state groups and suggest ideas to improve services.
- Conduct parent support groups, workshops, classes, and peer-to-peer networks.
- Speak on panels, webinars, and at conferences. Sample topics:
    - Concussion management
    - Early childhood obesity therapy
    - Families as Allies
    - How to best assist parents and
    - children shift to adult care
    - How to make practices youth-friendly
- Collect patient & family stories (about local topics and concerns like vaping, mental health, child development) for lawmakers.
- Identify areas of family interests that impact pediatric health.

Advanced Tasks

Advocacy and Law

- Involve parents of children with complex needs in governmental advocacy efforts.
- Host a children's mental he alth forum with a caregiver to teach lawmakers.
- Partner with Parent Teacher Associations and youth to pass Tobacco 21.
- Participate in the Speak Up for Kids advocacy day, governmental hearings, and press events.

Policies and Activities

- Set up a panel of pediatricians, family medicine providers, parents, social workers, etc. to get input on warm handoffs between primary care and behavioral health.
- Help identify plansthat focus on equity.

Training

- Engage families in Medical Home Projects
- Include a parent co-trainer in eventsto share their story about the difficulties of talking with doctors and getting care.

Appendix C / Promotional Materials

Sample Contact Letter

Hello fellow parents,

I would like to introduce myself to you. I am [*your name*], parent of [*children's name*]. Our family has been going to [*practice name*] since [*year*]. I have been working with a team from our clinic since [***date***] to bring new and innovative care to all families seen in the clinic. In this work I have been asked to serve as a lead for the parent advisory board.

You are receiving this letter from me because you have been chosen by various members of the clinic as a potential member of the parent advisory board. This means that the clinic believes you can be a helpful and important voice to help lead the clinic to better care of all families and children. How exciting!!! I hope you feel good about this recognition, it's a huge compliment.

My role is to help lead this group in communicating our ideas to the clinic staff. I will begin this work by having an initial meeting of the parent advisory board with myself and you, if you choose to be a member of the group. The first step for you is to decide if this is something that you would like to participate in. I want you to know that I understand busy lives. You can elect to be a member and, going forward, there will be many ways for you to participate even if you cannot attend every meeting. I will be available via email and you can let me know ideas etc. even if you cannot come.

The goal of the advisory group will be to meet and assess what is happening at the clinic and also to give feedback to the clinic on ideas they would like to try. My hope is to meet at least 4 times a year and feel that we provide good feedback to the clinic and make an impact in the care of our children and all families.

I would hope to hear back from you in the next few weeks. Just email a quick yes or no, ask questions, etc. This is a new role for me and we will build this as we go along so please feel free to ask anything. I may not know the answer but will respond with something!! This email address is how you can contact me. I do not work at the clinic so please do not call hoping to contact me.

Thank you for your time. I hope to hear from you soon.

Sincerly,

[*insert name*]

Sample Mission Statement

CHILDHOOD HEALTH
ASSOCIATES OF SALEM

PARENT ADVISORY BOARD

WE ARE...a group of parents.

WHO ARE UNITED IN...wanting the best care of our own children and all the children who are seen at Childhood Health Associates of Salem.

TO ACCOMPLISH THIS...we will advise clinic leadership regarding the needs and priorities of families and patients seen at Childhood Associates of Salem and we will partner with them to lead the clinic to quality improvement.

WE KNOW WE ARE HAVING AN IMPACT WHEN...we hear feedback from clinic leadership regarding our input and we see positive changes in the care provided by Childhood Associates of Salem.