The staff liaison role – Tips & ideas

Roles, ideas, tips and best practices

Who is a staff liaison?

- A staff liaison is a consistent "go-to" person for the patient and family advisor (sometimes known as a PFA or as an advisor). They are the primary point of contact for the advisor and act as a bridge, supporting advisors to participate fully with the team, committee or project.
- A staff liaison may be supporting advisors in a wide range of activities, for example: supporting an advisory committee with many advisors, supporting one or two advisors on a quality committee, working with advisors to share their story, facilitating focus groups, supporting a working group etc.
- This information sheet is more introductory in nature – intended primarily for liaisons supporting advisors on committees.

What is the staff liaison role?

- Build and sustain a relationship with the advisor – being open, sharing, creating trust and communicating.
- Provide orientation to the committee and/or the project.
- Provide support to the advisor – help facilitate their participation when needed and help the team or committee to understand the role and engage with the advisors.
- Navigate engagement challenges – when things don't go well, or logistics get in the way. Ensure barriers to engagement are identified and addressed.
- Create an open environment – In order for everyone to learn and develop the best solutions, advisors are encouraged to share both positive and negative experiences. Like all members of a committee = advisors are full partners at the table. They have signed confidentiality agreements and been oriented to AHS.
- Provide feedback and communicate how advisors' contributions have informed the work.
- Be a champion of engagement and including the voice of patients and families – in your team, your daily work and in AHS policies, strategies and planning.

What are some practical strategies?

Before the meeting

- Remove barriers for the advisor – consider meeting time, meeting place, arrange parking in advance, reimburse expenses. Have you provided detailed instructions to get there? Is there a virtual option? Have you given the advisor a contact number in case they get lost/can't get onto the meeting?
- Ensure other staff/team members are ready to partner with advisors and help to create a safe space within the meetings for advisors to share their comments/perspectives. You might do some education for staff/have conversations prior to the first meeting.
- Prepare advisors – set up a pre-meeting meet to ensure advisors understand the background of the meeting, who will be in attendance, any terminology they might not be familiar with. Talk about what their role might be, what the meeting with look like, what to do if they have questions, who will be there, and what questions they might hear.
- Find out the best way to communicate with the advisor- email, phone, etc. and ensure their confidentiality is protected.
- It is always important to check in prior – but advisors will become more comfortable as the work progresses.

During the meeting

- The liaison should encourage introductions and encourage cameras to be on especially when advisors are sharing their story.
- Help advisors feel welcomed and involved, clarify the advisor role if needed, encourage participation, and acknowledge contributions made.
- Recognize there is a lot of new information for advisors and they may have many questions.

After the meeting

- Debrief with advisors – a quick chat about their experience, what they heard and saw, address questions they may have. Let advisors know how their feedback might be used.
- Support the advisor with recording their volunteer hours if needed, or provide a record to Volunteer Resources, so their volunteer status remains active (important for AHS insurance and liability).

In general

- Try to have more than one advisor on a project or committee – this promotes diversity and alleviates the pressure of being "the patient voice."
- Anticipate absences.
- Be alert for opportunities where patient & family perspectives could be utilized in different ways throughout your project.
- Commit to do something with the information shared and stick to the promises you've made to your patient or family members.
- Promote networking for advisors and find educational opportunities where possible.
- Maintain communication with Volunteer Resources – Does it seem to be a good match? Do you need any support with education or training for the advisor?
- Evaluate - The evaluation of engagement activities should include the process used and the outcomes from the perspective of the advisor and the committee members.
- Join the Staff liaison Community of Practice for ideas and conversation. Contact patient.engagement@ahs.ca to join.
- Take care of yourself and your wellness.

Additional information, resources, and support

A Guidebook for Engaging Patient and Family Advisors

The Voice of Patients and Families - Guide to Patient Engagement

Family & Community Resource Centre: PFCC Resources (Alberta Children's Hospital)

Engaging for Excellence: A Staff Liaison's Guide to Best Practice (Strategic Clinical Networks)

How to successfully engage patients and families in building quality-improvement initiatives: 10 Lessons Learned from Patient and Family Advisors (CFHI/HEC)

How to successfully engage patients and families in building quality-improvement initiatives: 10 Insights from Healthcare Providers and Leaders (CFHI/HEC)

AHS Provincial Patient & Family Advisor Network (Volunteer Resources)

For consultation, information and questions on being a staff liaison – please contact patient.engagement@ahs.ca