



**TASK FORCE ON PATIENT AND FAMILY ENGAGEMENT  
FOCUS ON HOSPITAL AND HEALTH SYSTEM LEVEL INTERVENTIONS (DAY 2)**

**North Carolina Institute of Medicine  
630 Davis Drive, Suite 100  
Morrisville, NC 27560  
10:00 – 3:00  
July 24, 2014  
Annotated Agenda**

**Goals for the Meeting: To identify evidence-based and best practices for engaging patients more actively in their own care at the hospital and health system levels (eg, through culture change, patient and family advisory councils, communications/operations changes. Note: This is the second meeting of two meetings devoted to this topic.)**

**10:00 – 10:15      WELCOME, INTRODUCTIONS, & INPUT**

**Kimly Blanton**  
Patient Advocate  
Vidant Health  
*Co-chair*

**Melanie Bush, MPAff**  
Assistant Director, Policy and Regulatory Affairs  
Division of Medical Assistance  
North Carolina Department of Health and Human  
Services  
*Co-Chair*

**Warren Newton, MD, MPH**  
Director, North Carolina AHEC Program  
William B. Aycock Professor and Chair  
Department of Family Medicine  
University of North Carolina School of Medicine  
*Co-chair*

**10:15 – 10:30      OVERVIEW OF DAYS SESSION**

**Kimberly Alexander-Bratcher, MPH**  
Project Director and Research Associate  
North Carolina Institute of Medicine  
*(Note: Ms. Alexander-Bratcher will remind the Task Force about what we covered in prior meetings, give a brief overview of the day's meeting, and remind the group what we will be covering in future meetings)*

**10:30 – 11:45**

**DISCUSSION OF POTENTIAL RECOMMENDATIONS**

**Adam Zolotor, MD, DrPH**

Vice President

North Carolina Institute of Medicine

*(Note: Dr. Zolotor will lead a discussion about the potential recommendations that the Task Force has brainstormed to date and will guide the Task Force in prioritizing recommendations.)*

**11:45 – 12:15**

**LUNCH**

**12:15 – 1:45**

**QUALITY, SAFETY, AND PATIENT AND FAMILY ENGAGEMENT**

**FRAMING OVERVIEW**

**Lisa Ann Morrise, MArts**

Co-Lead Patient and Family Engagement Affinity Group

Partnership for Patients

*(Note: Lisa Morrise graduated from the University of Kansas with B.S., Journalism, and M.A., Broadcast Management, degrees. She was named the Outstanding Broadcasting Student of the year by the National Association of Broadcasters. She worked at radio stations and as a broadcast management consultant. She is an Adjunct Professor and taught Media Management for Brigham Young University. Ms. Morrise has three children with special needs, including her daughter, now 21, who was born unable to breathe or swallow. She has lobbied for pediatric palliative care, served on the Governing Board of Salt Lake's early intervention program, and served on the Primary Children's Hospital Family Advisory Council which she facilitated. Ms. Morrise is the Patient Co-Lead on the Patient and Family Engagement Affinity Group for the CMS National Partnership for Patients. Lisa has also served in the Salt Lake community in numerous organizations and has been a candidate for State Representative.)*

**PANEL**

**John Vitiello, PT**

Care Improvement Specialist

The Carolinas Center for Medical Excellence

*(Note: John Vitiello coordinates CCME's North Carolina Quality Improvement Organization cardiac population health program, helping physicians improve care provided to patients with cardiovascular disease, and leads CCME's patient and family engagement special innovation project. John's past roles at CCME have included Medicaid medical necessity review, the development of a live allied health continuing education service line, and an eLearning CME service line. He is a native of Long Island, NY and a graduate of the State University of New York at Stony Brook. Prior to joining CCME, John practiced physical therapy full time in a variety of health care settings.)*

**Melissa Thomason**

Patient and Family Advisor

Vidant Health

*(Note: At just twenty-eight years old and as a first-time-mom-to-be, Melissa*

*Thomason, a former public school teacher, suffered a Type I aortic dissection at 35 weeks pregnant. Melissa survived her first open-heart surgery that day and two more in the year that followed. Today, she serves as a Patient and Family Advisor for Vidant Health System in Eastern North Carolina and chairs East Carolina Heart Institute's Patient Advisory Council. Mrs. Thomason has shared her story with hundreds of healthcare workers around the country and has finally "found purpose in all of the pain."*)

**Lynne Taylor, BSN**

Pediatric Quality Improvement Facilitator  
Community Care of North Carolina

*(Note: Lynne Taylor received a BSN from North Carolina Central University in Durham, NC. She is a certified professional of healthcare quality and has been working in a variety of roles and health care settings since 1973. Currently, Ms. Taylor is the Community Care of North Carolina Pediatric QI Facilitator in Raleigh, NC, providing training and consultation to 18 QI Specialists working across the state in primary care practices within the 14 CCNC Networks. Prior to working at CCNC, Ms. Taylor worked as a Quality Improvement Consultant at Wake Area Health Education Center in Raleigh, NC, and in both nursing and administrative roles at two hospital locations within the Duke University Health System in Durham, NC, that included leading organizational and departmental quality improvement initiatives.)*

**1:45 – 2:15**

**PATIENT PORTALS**

**Kimberly Alexander-Bratcher, MPH**

Project Director and Research Associate  
North Carolina Institute of Medicine

*(Note: Ms. Alexander-Bratcher will present a brief overview of patient portals, including evidence about their implementation and effectiveness. She will then lead a discussion and solicit thoughts from the Task Force about the benefits and common challenges with implementing and using patient portals.)*

**2:15 – 3:00**

**NEXT STEPS & FEEDBACK**

**Adam Zolotor, MD, DrPH**

Vice President  
North Carolina Institute of Medicine

*(Note: Dr. Zolotor will lead a discussion to solicit ideas from the Task Force about possible recommendations to promote the use of evidence-based or promising practices at the hospital and health system levels that improve patient and family engagement based on the day's presentations.)*