Partners in Care Pandemic Toolkit Guide

Overview

Caregivers are essential partners in care and play a critical role in providing physical, emotional, and cognitive support to family members, partners, and friends in many care settings including hospitals, long-term care homes, community care, and Ontario Health Teams. This became even more evident early in the pandemic as visitor restrictions resulted in unintended consequences for patients, residents and their caregivers. The Ontario Caregiver Organization introduced the Partners in Care Pandemic Toolkit to provide organizations with practical resources to welcome caregivers as partners in care in a safe and meaningful way.

At the heart of the toolkit is the Caregiver ID – a visual way to demonstrate an organization’s commitment to recognizing and embracing the valuable role of caregivers. Caregiver ID, along with other resources in the toolkit, supports the culture of partnering with caregivers and empowers caregivers to participate as a part of the care team. Those who have adopted the toolkit resources have found them to be helpful in developing essential caregiver programs that align with Ministry guidance during COVID-19. More importantly, these resources can help build a culture that engages and welcomes caregivers as partners in care during the pandemic on a long-term basis.

What You Will Find in this Guide

Tools in the Toolkit: Overview of each tool

Caregiver ID: A deeper look at the benefits of this tool

Opportunities for Learning & Connection: Connect and learn from others

Insights & Evidence: Importance of engaging caregivers as partners in care

Implementation: Tips and advice from early adopters

Beyond the Toolkit: Additional resources to support a Partners in Care approach
Tools in the Toolkit

The Partners in Care Toolkit was developed in collaboration with Ontario caregivers to support the safe re-integration of caregivers as essential partners in care during Covid-19, and beyond. The toolkit includes:

- This Toolkit Guide to provide an overview of the resources and implementation tips
- 3 adaptable and customizable resources
  - Caregiver ID\(^1\), including printable badges and templates
  - Partners in Care Pledge
  - What Caregivers Can Expect

Caregiver ID: The Caregiver ID is a badge, sticker or card used to facilitate the participation of family caregivers in care settings. Caregiver ID is a strong demonstration of the organization’s commitment to family caregivers. During COVID-19, a caregiver identification badge can help facilitate the safe entry of caregivers into and within the building, distinguish essential caregivers from visitors, and build relationships in support of patient, resident, or client care. Printable badge/sticker templates are included in the toolkit.

Partners in Care Pledge: A pledge to secure the mutual trust and commitment of the family caregiver and the organization to working together as partners in care while keeping staff, patients/residents/clients, caregivers, and the community safe during COVID-19. Below is an example of the pledge for a long-term care setting.

<table>
<thead>
<tr>
<th>Partners in Care Pledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>We, the home, pledge to do our part to keep family caregivers, residents and staff safe by:</td>
</tr>
<tr>
<td>- Communicating the current family presence or visitation status and procedures visitation status and procedures</td>
</tr>
<tr>
<td>- Teaching caregivers the safest way to put on and take off safety equipment such as a mask and other personal protective equipment if required</td>
</tr>
<tr>
<td>- Enabling caregivers to practice physical distancing with staff and other residents</td>
</tr>
<tr>
<td>I, the caregiver, pledge to do my part to keep the person I support, the other residents and the staff safe by:</td>
</tr>
<tr>
<td>- Following existing public health orders to protect myself and reduce the risk of contracting or spreading COVID-19</td>
</tr>
<tr>
<td>- Answering screening questions honestly and accurately</td>
</tr>
<tr>
<td>- Following all instructions by staff and asking questions when I don’t understand or need clarification</td>
</tr>
</tbody>
</table>

What Caregivers Can Expect: A tool for communication with families and caregivers to help simplify policies and pro-actively answer questions that are likely to arise. This can be customized and updated to reflect important messages and policies that may impact essential caregivers and families.

\(^1\) Adapted from materials originally created by The Change Foundation and one of its Changing CARE teams
Caregiver ID: A Deeper Look

Why Identify the Caregiver?
Identifying the caregiver through a Caregiver ID is an important step in establishing or strengthening a relationship that can yield better care outcomes, better understanding of the care recipient and their condition, and better care experiences for patients, residents, or clients, and family caregivers and staff.

When paired with staff training to support culture change, the Caregiver ID icon is a powerful way of demonstrating an organization’s commitment to caregivers as partners in care.

Caregiver ID Background
Caregiver ID was developed in Ontario (modeled after programs in the UK) by The Change Foundation along with its Changing CARE teams and caregivers through a co-design process.

The value of adopting Caregiver ID was demonstrated in several hospital settings before COVID-19, but new benefits have emerged during the pandemic; and the Ontario Caregiver Organization has been working to increase awareness and implementation of this valuable tool. Many care settings – including hospitals and long-term care homes – have adopted Caregiver ID during Covid-19 as part of their essential caregiver programs.

Policy Guidance for the Reintegration of Caregivers as Essential Care Partners released by Healthcare Excellence Canada includes caregiver identification as one of the key measures that can help overcome barriers to consistent and supportive caregiver access.

Benefits of Caregiver ID during COVID-19

✓ Helps support the screening process and safe movement into and throughout the building
✓ Reassures staff and patients/residents/clients that the caregiver has been screened, has received training on PPE and infection control, and has permission to be there
✓ Reassures caregivers that staff know they have permission to be in the building and may help them feel more welcome
✓ Supports essential caregiver and/or family presence policies
✓ Gives caregivers confidence to ask questions and be active partners in care
✓ Clearly identifies caregivers, especially during staff or shift changes or when masks and PPE make it more difficult to recognize caregivers
✓ Helps distinguish caregivers (and the essential role they play) from general visitors
✓ Recognizes the caregiver’s role as an essential care partner and facilitates the active partnership between caregivers and staff in providing care and decision-making
Opportunities for Learning & Connection

The Ontario Caregiver Organization formed the Partners in Care Learning Collaborative in 2020 to support rapid implementation, cross-sector learning, resource sharing and knowledge exchange with a group of early adopter organizations. Early adopters of Partners in Care during the COVID-19 pandemic have noted that learning from peer mentor organizations about their experience was a key success factor in implementation.

If your organization is interested in learning more about Partners in Care and connecting with others to support implementation, contact the Ontario Caregiver Organization at partners@ontariocaregiver.ca for more information.

Insights & Evidence

Insights from caregivers

We have heard from caregivers about what life has been like for them and those they care for during the COVID-19 pandemic. General anxiety about the pandemic, combined with visitor restrictions and changes to caregiver access to their care recipient have often resulted in feelings of fear, grief, loss, and heartbreak. Throughout the pandemic, the emergence of the social media hashtag #notjustavisitor underscores the notion that caregivers are not just social visitors, but play a critical role in the physical, emotional and cognitive care of patients, residents, and clients.

What does the evidence say?

There is strong evidence¹ to suggest that caregiver presence in care settings is important for patient and resident care. Emerging research from the COVID-19 pandemic indicates that visitation policies supporting caregiver presence in hospitals are beneficial for sustaining high quality care². Caregiver presence in hospitals and long-term care settings can result in a wide range of benefits, including:

- Improved safety and quality of care for patients and residents
- Decreased risk of falls
- Reduced hospital admission
- Improved physical and psychological well-being, particularly for patients and residents with culturally diverse needs and complex conditions, that may include:
  - Decreased rates of depression
  - Reduced social isolation
- Better staff morale and improved communication across teams
- Improved experience for patients, residents, caregivers and staff
- Cost savings
Implementation

Tips for successful implementation from early adopters

The following key tips and learning are shared from Learning Collaborative organizations based on their implementation experience:

Be guided by values, not fear

✓ Be driven by a focus on quality of care and improving the care experience for everyone
✓ Consider the risk of COVID-19 in addition to other risks related to the impact of limiting caregiver presence
✓ View barriers as problems to solve to enable safe caregiver presence

Ensure strong organizational commitment

✓ Make the case for change – building a culture of meaningful caregiver engagement is important now...and for the long-term
✓ Demonstrate commitment from leadership that caregivers are partners in the care team
✓ Identify an executive lead dedicated to moving things forward

Dedicate resources and use a quality improvement approach

✓ Identify a project lead to coordinate efforts
✓ Establish a working group to support a co-design approach to implementation with key stakeholders
✓ Develop processes to track caregivers in your charting system
✓ Pilot the launch in one setting (e.g., floor or unit) as part of a Plan Do Study Act (PDSA) cycle, then expand and scale up
✓ Think ahead to the next phase and be ready to adapt
Involve key influencers and stakeholders – go far, wide and deep

✓ Identify and gain support of internal champions
✓ Ensure that caregivers and care recipients are engaged in your planning process – they bring valuable expertise
✓ Engage existing groups, such as Patient Family Advisory Committees and/or Family Resident Councils, and offer different types of engagement opportunities (e.g., internal working group, surveys, advisory panels)
✓ Engage a broad range of staff, including security, housekeeping, personal support workers, professional practice, & physicians
✓ Partner with other organizations to engage them as collaborators (e.g., Ontario Health Teams, local public health units, other providers)

Communicate to build clarity and confidence

✓ Communicate pro-actively to staff, families, patients, residents, and clients regarding changes and updates to policies
✓ Develop a process to address concerns and to problem-solve glitches, unanticipated situations, unique circumstances
✓ Listen, anticipate, and address fears and concerns
✓ Hold daily staff huddles

Adapt and use existing tools

✓ Revise and update your existing family presence/visitor policy to reflect and support this initiative.
✓ Leverage and adapt existing resources, including:
  o Training and education for all staff about new policies/processes and to support a culture of caregivers as partners in care by using Caregivers as Partners e-learning modules
  o Training, education, and orientation for designated care partners/essential caregivers to ensure they understand policies and are comfortable with IPAC requirements Tools and resources created by organizations that have already implemented

Finally, support an equitable approach to Partners in Care by ensuring that policies provide access to basic needs for care recipients and do not create unintended barriers for patients, residents, clients, or caregivers. Care providers should also continue to be provide services in culturally sensitive and safe ways to the diverse communities they serve.
Beyond the Toolkit – Additional Resources

Policy direction

- **Policy Guidance for the Reintegration of Caregivers as Essential Care Partners** (Healthcare Excellence Canada)
- **Spotlight Series Webinar: Policy Guidance for the Reintegration of Caregivers as Essential Care Partners** (Healthcare Excellence Canada)
- **Person-Centered Guidelines for Preserving Family Presence in Challenging Times** (Planetree)
- **Care Presence Policies During COVID-19** (OHA)
- **Advancing Family Presence Policies and Practices in the Canadian Health and Care Context: COVID-19 and Beyond**

Essential Together tools (Healthcare Excellence Canada)

- **Evidence Brief: Caregivers as Essential Care Partners**
- **Essential Together Tool: Identifying Strengths and Improvements to Reintegrate Essential Care Partners**
- **Essential Together Huddles: Connecting for peer-to-peer learning and support**
- **Map for the Reintegration of Essential Care Partners**
- **The Re-Integration of Family Caregivers as Essential Partners in Care in a Time of COVID-19**

Training & education

- **COVID-19 IPAC Fundamentals Training, Public Health Ontario**
- **IPAC for caregivers and families, McMaster University**
- **IPAC for LTC team members and essential caregivers, CLRI**
- **Caregivers as Partners e-Learning Suite (Ontario Caregiver Organization)** — This e-learning suite provides practical education on how to engage, support and empower caregivers. The e-learning suite is applicable across multiple settings for all staff and includes three 20-minute modules:
  - Understanding the Role of Caregivers
  - Communicating with Caregivers
  - Empowering Caregivers

---