

Facilitating transformation from within the workplace. Embracing person-centred systems and process through participatory research.



Queen Margaret University CENTRE FOR PERSON-CENTRED PRACTICE RESEARCH

A Story

#### **The Story Tellers**



Dr Michele Hardiman Practice Development , Education and Research Facilitator.



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Professor Jan Dewing Sue Pembrey Chair of Nursing Director of The Centre for Person-centred Practice Research. Queen Margaret University



# Making Time to make Sense of complexity of the work place.





Using two models of workplace facilitation to create conditions for the development of personcentred culture: A PAR study

#### Dr Michele Hardiman

Facilitating and enabling work-based facilitators in the midst of practice.

"Facilitating on the Run"

**Ms Laura Taheny** 

Designing and implementing an Electronic Nursing Record as part of the Integrated Hospital Information System. A Practice development Approach.

"From Mechanical to meaningful capture of Patient Information."

Ms Sinead Hanley



# An evaluation of an electronic record.

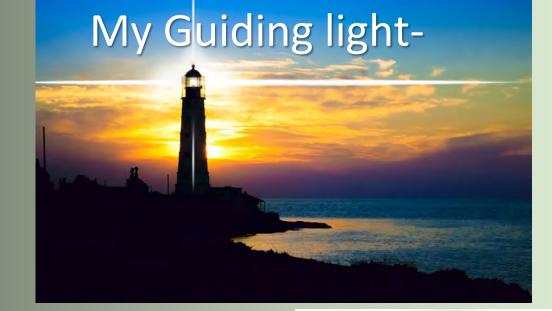
"What have we learned and what next."

## Professor Jan Dewing



## **Chapter One**

Using two models of workplace facilitation to create conditions for the development of person-centred culture: A PAR study Dr Michele Hardiman



Person-centred Practice Framework (McCormack & McCance 2017)



Culture is defined within the workplace, if culture is to change learning is needed to support transformation within the workplace. (Raelin, 2008).

What can we not see in our own workplace?

Get beneath the surface of what's going on – a quest for enlightenment, empowerment and emancipation.



#### **Research Design**

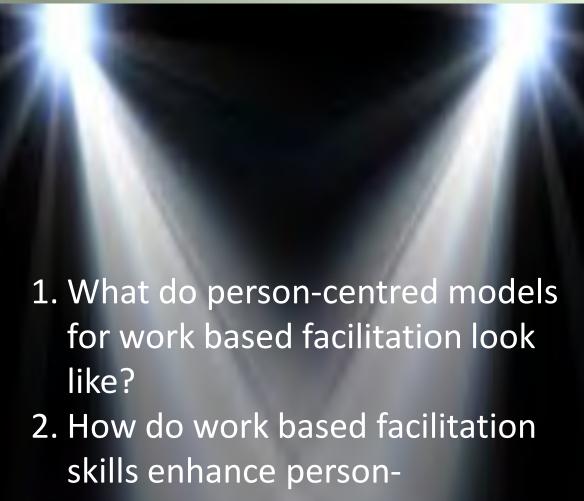
The study is situated within critical social science and draws on participatory action research to explore and refine two facilitation models: Critical Allies and Critical Friends.

Greatly influenced by Critical Companionship (Titchen, 2000) & involved exhaustive critique of related research.

The researcher adopted an insider approach working with nursing leaders within an acute hospital setting.

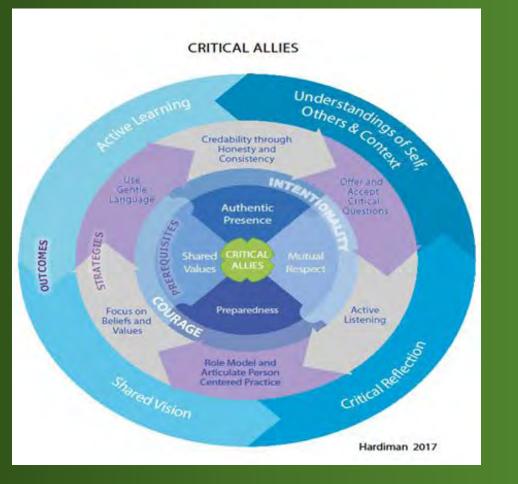
Five cycles of reflection and action cycles took place followed by a meta-analysis.

### Seeking to find the answers.....

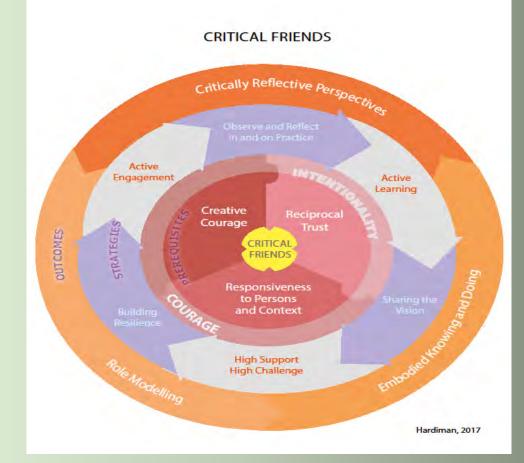


centredness?

# Critical Allies are persons on your side that are not yet your friends



# Critical Friends develop though building on the relationships and embodied understanding.



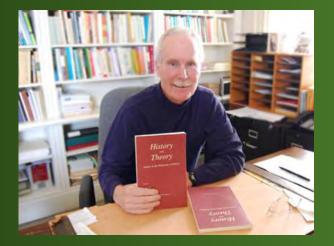
#### Philosophical Underpinnings

Critical Social Science and the quest for enlightenment, empowerment and emancipation.



Jurgen Habermas's work on Communicative Competence

> **Brian Fay's** work on False Consciousness and Education and the conditions necessary for enlightenment to occur.



Brian Fay Contemporary Philosophy of Social Science

## **My Research Principles**

#### **1.A democratic process**

Communicative actions cannot be imposed; agreement reached must be by consensus and shared vision with the context of the worldview.

# 2. Enlightenment through critical social science process

The process of critical social science will in itself result in enlightenment in the social situation if facilitated to do so.

#### 3. Communicative competence:

Communication and participation leads to shared understanding and co-operation

# **4. Actions orientated to understanding**: When a false consciousness has been revealed

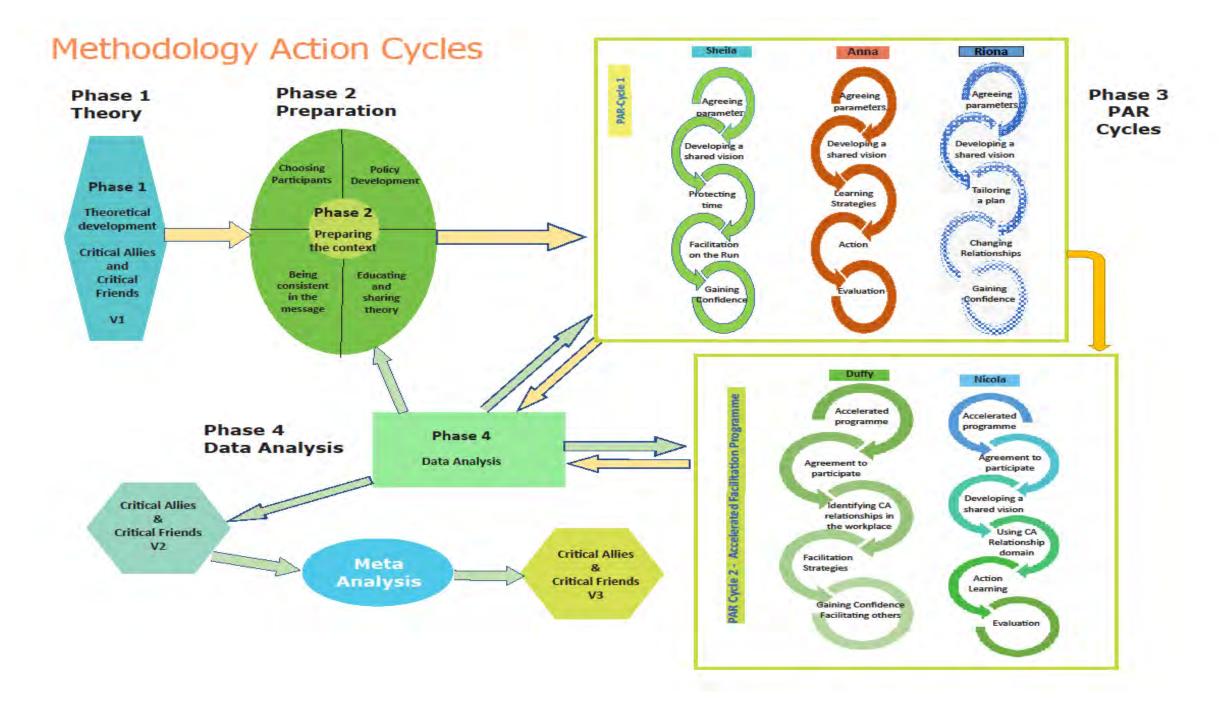
Choosing the right tool to analyse the culture that fits with the philosophical principles.

Five attributes of an effective workplace (Manley et al. 2013 p.150).

#### 1. Ten key values shared in the workplace.

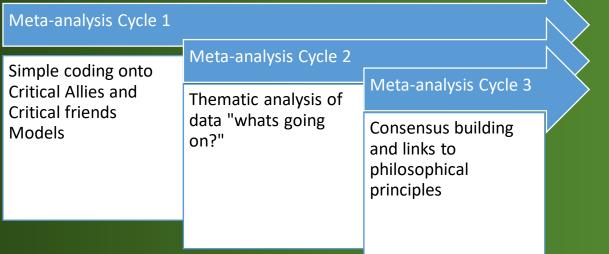
- i. Person-centredness
- ii. Open Communication
- iii. High Support /High Challenge
- iv. CIP principles
- v. Teamwork
- vi. Leadership development
- vii. Evidence use and Development
- viii. Lifelong learning
- ix. Positive attitude to change
- x. Safety (holistic)
- 2. Values realised in practice. Presence of vision and mission and collective responsibility.
- 3. Adaptability and creativity to maintain workplace effectiveness
- 4. Change driven by needs of patients
- 5. Formal systems of Evaluation and Governance

- Evidence of quality and effective care systems was polarised into different departments or specialised areas.
- Outcomes from treatment, throughput and efficiency appeared to take foremost attention rather than the experience of being a patient or member of staff.
- Organisation Values were shared with some but not all.
- There was a willingness and enthusiasm for innovation and creativity.
- Change was driven as an outcome of complaints and other external drivers.
- Unravelling of false consciousness needed to be sensitively facilitated.
- Recruitment and retention was an issue in all departments including nursing.
- There was strong leadership in nursing that wished to empower change



# Group analysis using collaborative and creative methods.

#### Data Analysis Map



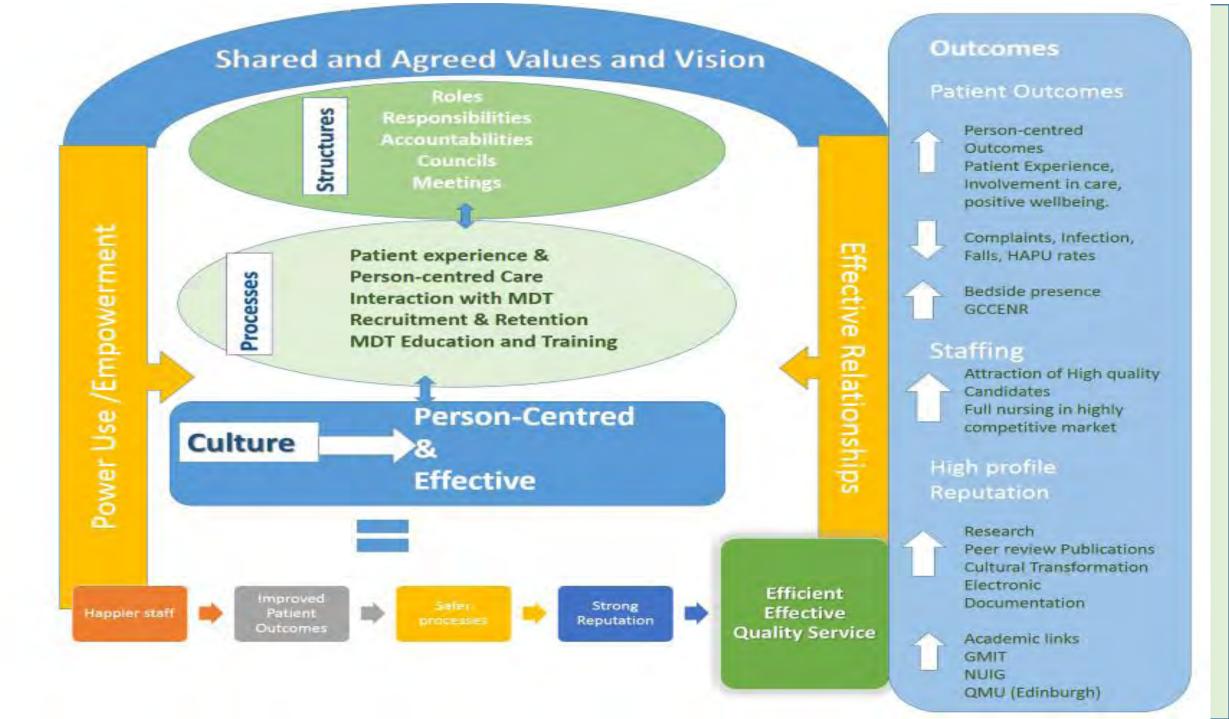
#### **4 Meta-analysis themes 12 Sub-themes** 2 1 4 3 Intentional Communicative Revealing Practical phenomena the culture competence wisdom through learning Perception of Intentional prehow communication agreed processes Tacit knowledge happens Cultural readiness Presence of Leadership discourse Knowing and Understanding Organised actions Form of communicationgentle language. Presence of a shared purpose Location of commiunication **Revealing false** consciousness

# **Key Findings**

- Facilitation is grounded in relationships.
   There are Four pre-requisites for a facilitative relationship.
  - Preparedness
  - Authentic Presence
  - Mutual Respect
  - Sharing Values

2. Facilitation does not always need protected time and space away from the workplace.

3. The models Critical Allies and Critical Friends offer stepping stones from novice to more experienced facilitation and complement the Critical Companionship model (Titchen, 2000).



Chapter 2 Facilitating and enabling work-based facilitators in the midst of practice.

"Facilitating on the Run"

Ms Laura Taheny



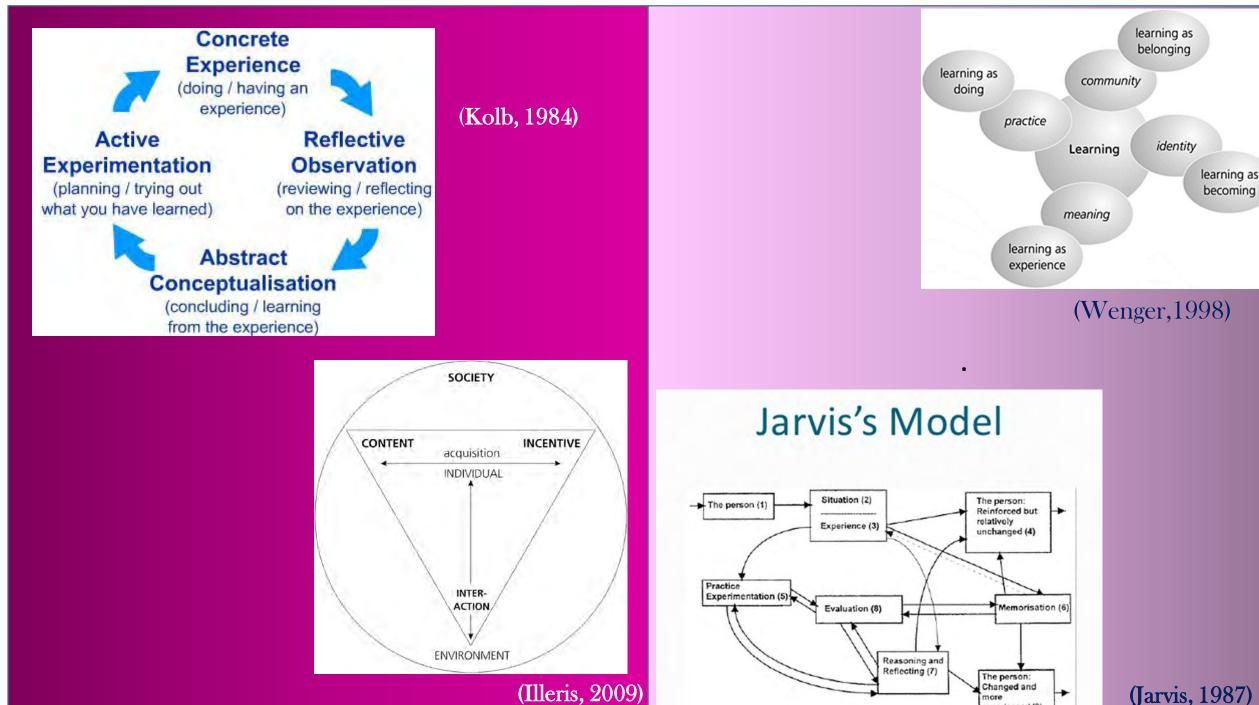
# Background to the Research

Internationally, person-centred practice is being integrated in healthcare policy to address concerns which arose as a result of failures in meeting minimum standards of care. The Person-Centred Practice Framework states that a "Healthful Culture" will emerge as an outcome; which is linked to flourishing. Flourishing as an outcome from developing person-centred cultures needs to be better understood. This can be done by learning through practice based approaches to research.



#### Aims of the Programme:

- 1. To prepare nurses to be workbased facilitators (WBF) of person-centred practice.
- 2. To test a specific method of facilitation; "Facilitation on the Run" developed as part of a PhD research study.



(Jarvis, 1987)

more experienced (9)



## Work-based Learning



(Manley et al. (2009), DoHC (2010), Durrant et al. (2011), Smith (1994), Rycroft-Malone (2004))

"The consequences of WBL include individual/personal, interdisciplinary/team and organisational effectiveness. WBL aspires to enable all those involved in WBL, and all those benefitting from it, to flourish and grow"

(Manley et al., 2009)

In Comparison to Training..



(Siebert & Walsh, 2004)

#### **Active Learning**



Dewing, (2008), McCormack et al., (2010)

#### **Facilitators in the Midst of Practice**



PD programmes are designed to meet the needs of nurses and healthcare staff within the workplace with a person-centred and evidence based resolve, facilitative learning and reflection (Manley et al., 2008) **Facilitation Workshops** Breaking Down the elements in order to build them up again



Using Critical Allies and Critical Friends as a pathway for Novice and Proficient facilitators



#### Use of Tools to help facilitators

#### learn.

#### Facilitation on the Run (FOR):

Facilitation does not always need protected time and space away from the workplace.

#### (Hardiman, 2017)

Facilitation skills and strategies can be integrated into everyday work quickly and unobtrusively we have called this method Facilitation of the Run. Quanta Margares University and its rest of the office offi

## Facilitation On the Run

FoR

#### How To Do It ....

Designed to support Novice Facilitators (Critical Allies) and Proficient Facilitators (Critical Friends) learning in the workplace.

S

Hardiman, M. (2016)

#### ASK CRITICAL QUESTIONS

Critical Questions are questions asked to stimulate thinking about why things happen the way they do and how they can be viewed and thought about differently.

The purpose of critical questions is to **unearth hidden** assumptions and knowledge about social conditions that can then be the subject of **reflection** and **dialogue** with the intention of transforming aspects of care.

Facilitation On the Run

#### FoR

These cards may be used by novice and proficient facilitators who wish to enable transformational learning of self and others within the workplace. They offer strategies for action in real time. The cards are designed to facilitate the development of person-centred cultures.

A Critical Ally is a person on your side who is not yet your Critical Friend. Hardiman and Dewing (2014)

al Allies cards may be useful at the beginning of a facilitative lip to prepare and build those relationships and new ways of ogether.

cal Friend is a trusted person who enables another to e context through a different lens in a challenging and supportive environment.' Nuttail (1993)

## Challenges of Becoming a Novice Facilitator





Learning has occurred when attention and actions have shifted towards new or different knowledge, understanding or behaviours (Lee & Dunston, 2011)

### Consequential Results of the Facilitation Programme

- Improved experiences of care for the giver and receiver
- Enhanced perception of flourishing amongst nurse leaders
- Decreased number of complaints
- Improved retention of nurses
- Attraction of high quality candidates

Some of which are those stated by Durrant et al., 2009 as aspirations of WBL

Flourishing is the highest good of human endeavour and that towards which all actions aim. It is success as a human being (Aristotle)

# Four essential elements for flourishing

- To feel challenged (by self and others)
- To feel connected (outside and within)
- To have autonomy
- To use our valued competencies (what we have learned in our lives)





The future looks bright the more enlightened and empowered I become If it is a cult I say I am happy to belong.





#### Chapter Three Designing and implementing an Electronic Nursing Record as part of the Integrated Hospital Information System. A Practice development Approach.

Ms Sinead Hanley Director of Nursing

### "From Mechanical to meaningful capture of Patient Information."



#### **Aims and Objectives**

The aim of the nursing project was to agree a framework for designing, implementing and evaluating a bespoke electronic nursing record that fits within and concurs with a hospital wide Hospital Information System (HIS) objectives :

- Ensure provision of a comprehensive, holistic record of assessment, planning care (interventions) and evaluation of the care delivered.
- Develop documentation that meets the legal and professional requirements
- Incorporate international nursing language.
- Provides evidence of person-centred nursing practice (McCormack & McCance, 2010)
- Includes the use of person-centred language in pre-set content which will in turn support person-centred practice.



### Methods

Using PD methodologies and principles to involve end users and clinical leaders in the development of a personcentred and evidenced based record.



Criticisms of using an EMR in nursing:

Common trends time it took to access and use the computers, insufficient hardware unreliable Wi-Fi personal belief by nurses that it detracted from delivering individualised care.

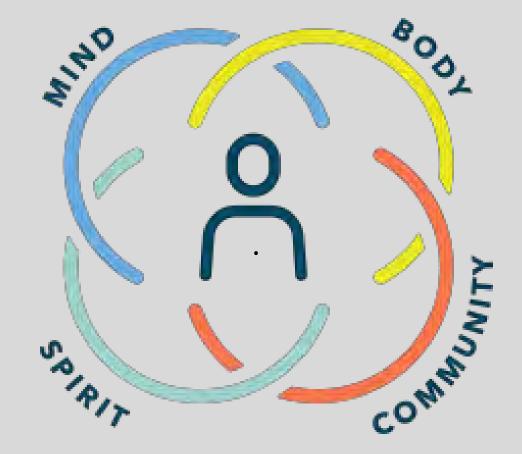
Timmons (2003)



General dis-satisfied with the quality of electronic documentation that is driven mainly by risk assessments and interventions and captures less about the relationship and care delivered.

Bøgeskov and Grimshaw-Asgaard (2018)

The core of person-centred care originates from the development of person centred relationships and is supported by shared decision- making which is inherently difficult to articulate and describe in a patient record



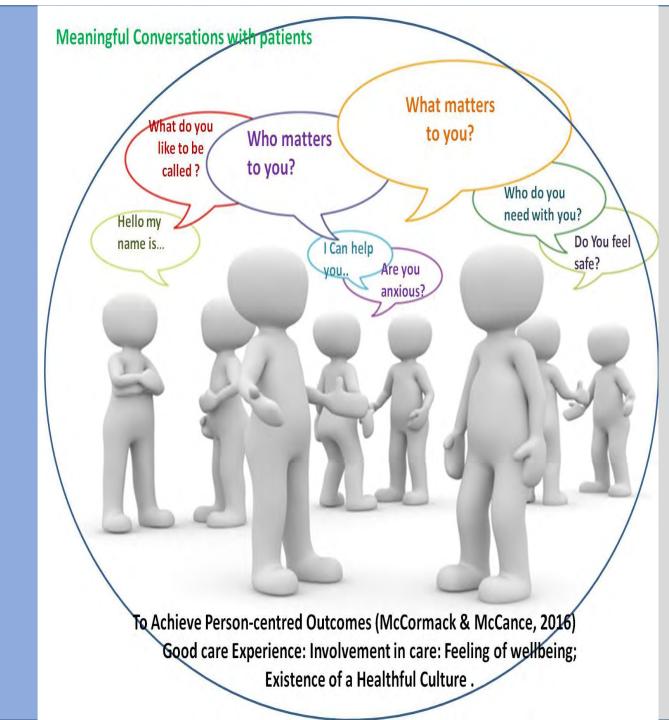
"Patients are not merely a set of problems but rather a unique and complex individual person. Capturing even some of that uniqueness is challenging even if we have the time"

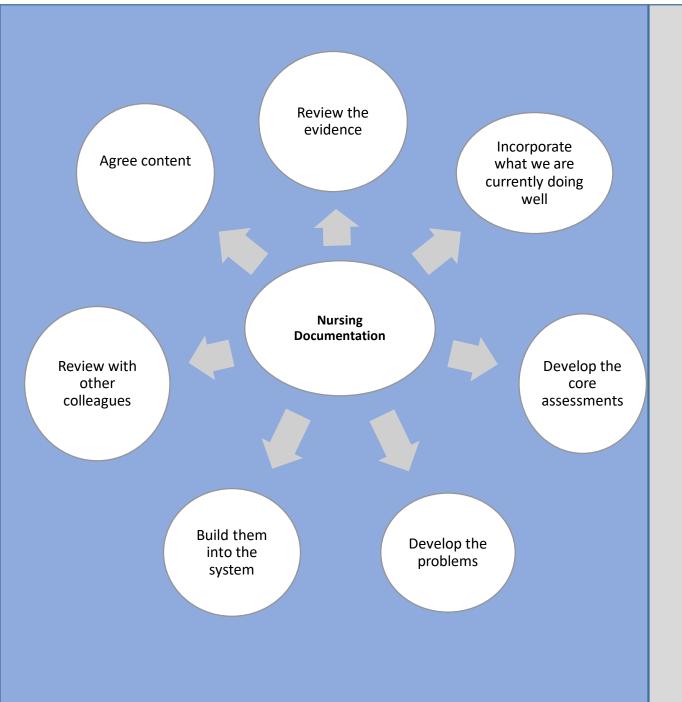
"I need to make sure I have passed on all the information about my patient"

How much information do I need to know if the patient is only here for one night? "How can I feel confident that my notes will reflect the relationship I have with my patients"

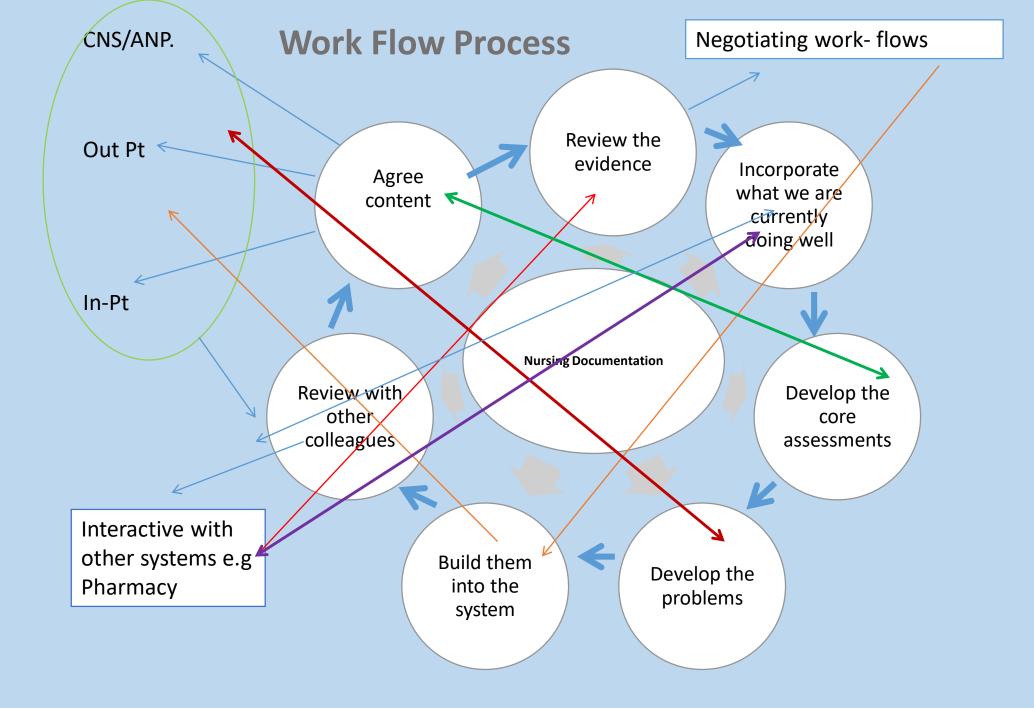
"Patients often share stories with us about things that are important to them but we're not sure how to write that." "Are Values and Beliefs only about Religion?"

"I am uncomfortable talking to patients about values and beliefs" Language Use and meaningful dialogue . How will we know what matters?





Complex Development-Work Flow Process Involving the end user in a meaningful way.



## Solution Focused and facilitated team working.



**Equality** 

Practice changes

International nursing language

Training needs

## Our Learning Key Point 1: Use of the CIP principles.

Relating all decisions back to the shared vision and objectives for the project.

Nursing staff needed to be happy that the information they sought as necessary, was either collected in an alternative section of the record or needed to be convinced that the information did not enhance the care record at all.



Our Learning Key Points 2: Focussing on assessment and establishing relationship as the gateway to a holistic record.

During an assessment, the nurse engages in a number of interrelated clinical, social and cognitive tasks to establish a picture of the person

To deliver on the principles underpinning nursing practice of respect; professional accountability and responsibility; quality of practice; trust and confidentiality (NMBI, 2014).



## Our Learning Key Point 3: Value of a Gatekeeper

Appointed as part of the process to prevent query duplications, variances in language and multiplicity and maintain true to the vision and values for the project.

A person who had sufficient authority and knowledge of the whole EMR is responsible for the governance of nursing documentation from a hospital wide perspective.





## An evaluation of an electronic record.

"What have we learned and what next."

Professor Jan Dewing

Where we began ... WHE MOVEN WACCTS Weekly huddles ecuram Launch CAI - Content Assossment Inde Focus on Person Centered Practice Workshops Research Paper. published !! 18 months later Research collobaration with Queen Margaret + Prof. Dewing => Patient Information Leafet . => ? Ways to collect Patient Stones => Analyse Parson Centered Processes whats next: => Evaluable Effectivness of Pahent Record Co kesearcher oorkit

## Background

Broader micro, messo and macro cultural development Build on PhD research findings Connection through Centre for PcP Research and ICoP Desire to find a research project to collaborate on

#### What is Person-Centred Practice? The nursing team in the Galway Clinic follow a Person-centred Practice framework (developed by International leaders in nursing McCormack and McCance 2017) which guides our practice to ensure that we care for you in the best way possible, the way you would like us to. It puts you at the centre of all your healthcare choices and decisions.

#### The Electronic Record of Your Care

Moving away from traditional, paper based documentation. We at the Galway Clinic have recently introduced an innovative, multi-professional electronic record of documentation. It was created in order to enhance the development of a personcentred culture by our nursing staff. We anticipate that this record will contribute to our knowledge, understanding and impact of person-centred documentation. We hope to capture person-centred care within the electronic record to enhance Nursing at the Galway Clinic, across Ireland and Worldwide.



If you want to know more about the research please ask to speak to your nurse who will put you in touch with the research team.



Authors: The Work-based Facilitators Group Date: July 2018

## Aims of the research

- To evaluate how the Galway Clinic Complete Electronic Nursing Record (GCCENR) contributes to personcentredness within the clinic based on The Person-centred Framework (McCormack and McCance 2017)
- 2. To suggest how the GCCENR can be further developed and any strategic and education/learning implications.

To collaboratively prepare for a larger funded research grant application.



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The Health Informatics Society of Ireland- Nursing and Midwifery (HISI-NM)



Invite to Open Day for Nurses and Midwives



HISI-NM invites Nurses, Midwives and other interested professionals to an open day at the Galway Clinic on September 7<sup>th</sup> from 11am to 3.30pm

RSVP to jackie.kirrane@galwayclinic.com or paula.kavanagh@hse.ie if you would like to attend. We look forward to meeting you on this day.

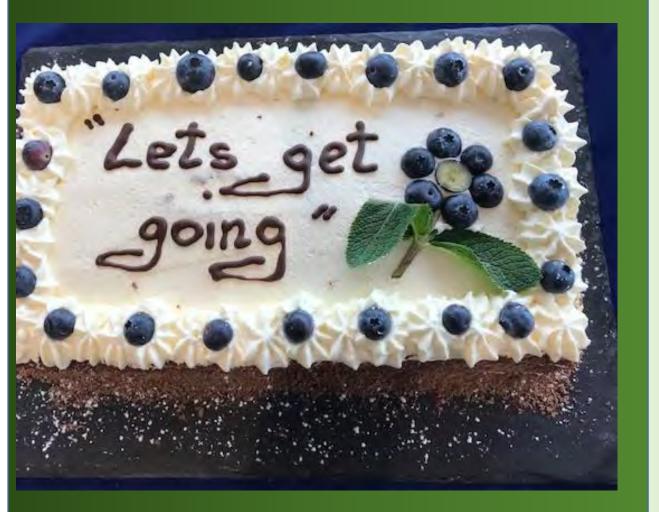
#### Features of open day:

- Presentations from members of projects occurring around the country
- Presentations of Electronic Patient Record at the Gabvay Clinic with main focus on Nursing
- Presentations from Chief Information Officer and Director of Nursing
  - Tours of the facility to which you can choose one:
  - Person Centre Care and documenting electronically
  - National Early Warning Score System
    Medication Administration electronically
- Attend HISI-NM meeting and meet and greet with other members

#### Who is HISI-NM?

HISI-NM is a Nursing and Midwifery Group for the island of ireland interested in how we use information, communications and technology to enhance the care we deliver. We are interested in how we can embrace new systems and technologies and share our knowledge with all nurses and midwives. What we do:

- Proactively seek to influence health policy development
- Collaborate with strategic national organisations and groups
- ✓ Guide and support education and training in healthcare informatics competencies
- Promote and publish nursing and midwifery informatics research



### International Practice Development Journal

Online journal of FoNS in association with the IPDC (ISSN 2046-9292)

Title of Article Type of Article Author/s Reference Date of Publication DOI Keywords Workbased facilitators as drivers for the development of person-centred cultures: a shared reflection from novice facilitators of person-centred practice Critical Reflection on Practice Development Alice Timlin, Amanda Hastings and Michele Hardiman Volume 8, Issue 1, Article 8 May 2018 https://doi.org/10.19043/ipdj81.008 Change, critical allies and critical friends, facilitation, person-centred cultures, transformation

working together to develop practic

#### Abstract

Background: Person-centredness is now an accepted term in policy and strategy documents worldwide, but Lavery (2016) highlights the need to bridge the gap between the aim of achieving person-centredness and the ability to deliver it. In this respect, practice development is a recognised methodology for enabling a person-centred culture (McCormack et al., 2013). This initiative follows on from a doctoral research study in the hospital that focused on the facilitation of person-centred cultures. Informed by the research, the nursing governance team decided to develop novice and proficient facilitators of person-centred practice for each nursing area in the hospital. These included clinical nurse specialists and clinical nurse managers.

## **Method: Evaluation Instruments**

- PCPI-S Person-centred Practice Inventory (Staff version)
- ✓ WCCAT Workplace Critical Culture Analysis Tool
- ✓ Person-centred Moments
- Interviews with patients and review of documentation
- ✓ Co-researcher Reflections

Note: 2 instruments were being piloted as a part of other international research

Activity	Target	Completion by
Read IPDJ article	1-2 weeks	19/9/2018
Observation/ WCCAT	3 weeks	26/9/2018
Planning		
Posters		
WCCAT V5		
Feedback		
Guidelines for		
wards		
Action Plan		
Practice Obs if		
needed		
Interview schedule	3 weeks	26/9/2018
Interview Questions	1 week	12/9/2018
PCPI-S Schedule	1 week	12/9/2018
Agree schedule		
Person-centred	Ongoing	Ongoing
Moments (Data		011201112
Collection)		

## Method

- Current level of person-centredness in the documentation and make observations relevant to other aspects of nursing practice.
- Prepare co-researchers and take part in a documentary/record of care analysis against the named model of person-centred practice.
- Prepare co-researchers and take part in observations of practice and staff interviews to see how the record of care is used in every day care.
- Share and feedback to staff groups with the Galway Clinic.
- Action Planning in teams with co researchers
  Make recommendations for education and learning



## The Person Centred Practice Inventory – Staff (PCPI-S)

Developed by Slater, McCormack and McCance (2017).

- 169 questionaires returned
- Data coded using an excel sheet which enabled the coresearchers to view the constructs and any anomalies in responses that would be of interest to their teams.
- Each clinical area had their own analysis which was shared with the team.
- Overall Hospital Scores Min 3.5 Max 4.35 in all constructs
  Each Facilitator was provided with an analysis of the scores from their own unit to feedback.
- □ Highlighting areas of high and /low scores.
- Most important aspect was turning data into information and knowledge for individual and team action

#### The Prerequisites of the Person-centred Practice Framework

Staff in (NAMED UNIT) scored in the higher band of of 4-5 in most of the constructs in this section **Professionally Competence: Developed Interpersonal Skills; Being Committed to the Job; Knowing Self** 

Of significant note is staffs responses to Q2, 4,5, 8, 9 Where most staff scored the highest sore of 5 demonstrating strong commitment to their roles in (NAMED UNIT)

2. When I provide care I pay attention to more than the immediate physical task.

4. I ensure I hear and acknowledge others perspectives.

5. In my communication I demonstrate respect for others.

8. I strive to deliver high quality care to people.

9. I seek opportunities to get to know people and their families in order to provide holistic care.

## WCCAT

Each WBF had a minimum of two opportunities to observe the culture using the WCCAT. In their own unit and then in another unit. As a team the WBF devised a plan.



## WCCAT Summarised using Claims Concerns and Issues Method

Concerns Issues claims Staff spoke to each other Noise pollution Do we need a holding bay? Boredom for patients – no and patients in a warm Should we be calling this space a holding bay? stimulation manner Can environmental changes Staff helpful and supportive Lack of privacy towards each other while Loud argumentative talk be made to protect patient between staff heard in one managing their workloads privacy? Does the holding bay need Staff good at sitting down area to be an open plan design? and explaining care to Staff speaking on English How do we do our patients language Staff good at listening to Documentation not done at documentation in real time? patient's concerns beside Do we need to take time to ISBAR tool used in handover Routinised care reflect on our day? Lack of space in some areas Is there too much routine? clear communication heard Discharge information given - ADU, ICU Aand E Is there not enough routine? Lack of medical staff clearly presence

## **Person-centred Moments**

Collection period 6 weeks: 80 accounts (52 staff-patient and 28 staff-staff) Analysis - 17/4/19

- Very busy shift. CNM covered breaks so other nurses could go. Was not taking a break herself. One staff member brought her back a coffee and some cake. " well you need something as well"
- The ward clerk created her own orientation booklet for other ward clerks . She was not asked to do this. This made it easier for new or replacement staff to find their role easier.
- Staff member dropped a prescription off to a patient's house who forgot to bring it home with them.
- Staff member who escorted one patient to their car. Found another patient struggling with a wheelchair and helped the person to where they were going.
- Patient who had not eaten for several days asked for a choc ice. The catering staff went to the shop to get the ice-cream and brought a second for the patients husband as it would encourage the person to eat
- Staff member brought a patients clothes home to wash them as she had no relative visiting
- Noticed a member of catering setting the table top the way the patient liked it
- A patient who was receiving palliative care had a great rapport with the care assistant. Patient was very glamorous and C/A sat with her had helped her do her nails.
- One staff member initiated staff to engage in mindfulness

**Patient interviews & review of documentation** Each Co-researcher conducted 4 interviews with patients using a template agreed by the team.

Interviews were conducted over a 4 week period in September 2018.

**Total 37 patient Interviews were recorded** 

Purpose of Interview Assess the use of documentation to enhance Person-centred care Persons experience of person-centred care. Preferred Name Values and Beliefs Contact Person Person-centred language.



## Findings

The indicators of culture showed that most departments were ready for the project and were responsive to new ideas and practices; suggesting the record of care should have been adopted and absorbed into practice. The results indicate that the record of care was visible in daily care practices to varying degrees. This and the other findings will be discussed, as well as the co-researchers learning outcomes.



# Recommendation from each member of the team following the research.

- Celebrate our person-centred moments e.g shared decision making
- Create professional portfolio to encourage reflection on practice
- Specific education/learning workshops for all staff on nursing documentation and its relationship to PCC
- Examine the barriers to staff nurses asking a person about their values and beliefs
- Change to e record: change header and questions about values and beliefs to what is important to the patient. Ask the person what they wish us all to know about them.
- More emphasis on the use of preferred name instead of patient

# Wiley Online Library

#### ORIGINAL ARTICLE

Using two models of workplace facilitation to create condition for development of a person-centred culture: A participatory action research study

Michele Hardiman PhD, RGN, RPN 📾, Jan Dewing PhD, MA, MN

First published: 24 April 2019 | https://doi.org/10.1111/jocn.14897

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#### Abstract

#### Aims and objectives

To examine facilitation in workplace learning where nurses are focused on creating person-centred cultures; to provide a framework for novice and proficient facilitators/practitioners to learn in and from their own workplaces and practices; and t provide the conditions where practitioners can gain an understanding of the culture an context within their own workplace.

#### Background

Evidence suggests that person-centred cultures depend on purposeful, facilitated practice-based learning activities. For person-centredness to become more meaningful nursing leaders in their daily work, focus must be placed on their acquisition and use of facilitation skills. The facilitation framework "Critical Companionship" remains an exemplar in the development of expert facilitation skills. Two sequential facilitation models were developed as "steps" towards Critical Companionship, as a framework for novice and proficient facilitators and practitioners to learn in and from their own workplaces and practices

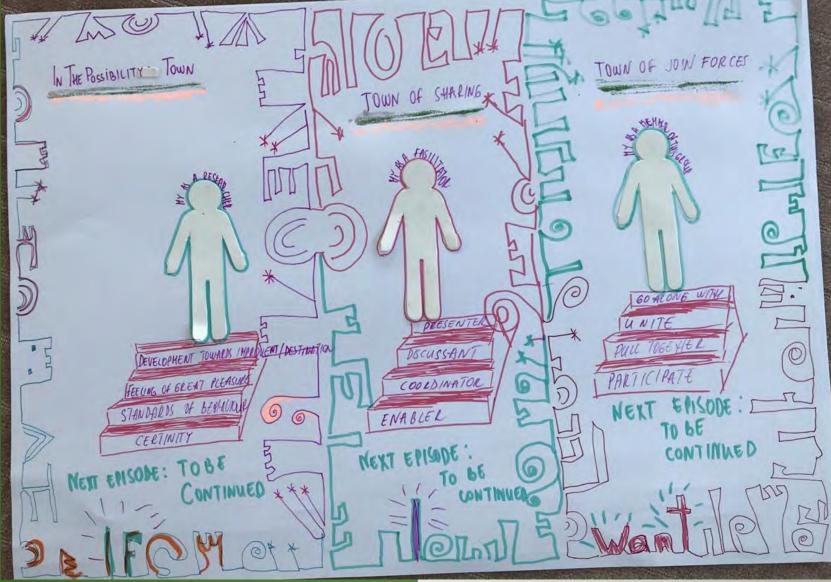
**Design and Methods** 

## **Overall Recommendations**

- E records/documentation can be successfully adopted
- □ Nurses need to be part of development team
- Education and learning needs to be attached to a nursing model
- Workplace facilitation and facilitators (Critical Allies and Friends) are key



## The Town Of Possibility





Clarity of vision and values and taking an agreed path.



Trusting the process of Facilitating Person-centred Cultures.





Thank you for listening!



Queen Margaret University CENTRE FOR PERSON-CENTRED PRACTICE RESEARCH



WINNERS EUROPEAN KATE GRANGER AWARD FOR COMPASSIONATE CARE 2019