

## **CHNC Educational Package**

### **Developing Leadership Skills for a Community of Practice: Examples include Chronic Disease Prevention and Self-Management**

#### **Module 4: Developing a Shared Body of Knowledge**

This module is the fourth in a series of five on developing leadership skills for forming and maintaining a CoP. The first three modules introduced the online educational package, dealt with forming the CoP, and evaluating the evidence. This module focuses on how a CoP functions during the period of identifying relevant resources and evaluating the use of resources in practice. The Personal Health Passport for clients, developed by an Ontario CoP, provides an example of knowledge development, and will be used in a case study. A copy of the passport is included with this module.

#### **Learning Objectives**

By the end of this module, you will be able to:

1. Identify the processes involved in developing, identifying, or adapting resources and process that are based on evidence
2. Consider how to assess the relevance of a resource and process for members
3. Discuss methods to use and evaluate the resource
4. Consider strategies for maintaining relationships among members
5. Plan for administrative tasks:
  - a) Identify signs that meeting times might need to be changed
  - b) Consider how to accommodate increase in exchange of information among members

#### **Possible Agenda for a Focused Discussion on Module 4 (1.5 hours)**

- 1) Introductions and Check-in (15 minutes)
- 2) Module Work (60 minutes)
  - a) Learning objectives and preliminary material
  - b) Discussion of questions
- 3) Preparation for module 5, round table and wrap-up (15 minutes)

## **Develop, identify, or adapt resources and process that are based on evidence**

In order to determine an appropriate resource, several aspects must be considered. The National Institute of Cancer Research provides an online book called 'Making Health Communication Programs Work' that provides extensive information. In simplified terms, the process involves determining:

- a) the appropriate message for the intended audience;
- b) the format, e.g.: brochure, videotape;
- c) settings where the message will be delivered; and
- d) message delivering channels and activities.

The channels can be interpersonal, group, organizational/community, mass media or interactive.

The website is: <http://www.cancer.gov/pinkbook/page4>.

The Health Communication Unit at the University (THCU) of Toronto has a detailed 12 step process to prepare a health communication campaign with many associated resources and checklists. The 'Health Communication Campaign at a Glance' and other resources are provided at:

[http://www.thcu.ca/infoandresources/resource\\_display.cfm?res\\_typeID=5](http://www.thcu.ca/infoandresources/resource_display.cfm?res_typeID=5)

The audio presentation explains the iterative process required for the development of evidence based resources and the leadership skills required to guide the process. The process is explained in terms of the development of the personal health passport over an eight month period.

## **Assessing the Relevance of a Resource and Process**

A parallel process to determining the evidence base is to continually check with the CoP members that the resource is relevant and feasible for them. The audio presentation explains how this was done for the personal health passport.

### **Discussion questions on evidence and relevance:**

1. ***What aspects of the personal health passport could be used to illustrate specific CCHN Standards?***
2. ***What type of evidence was used to develop the passport?***
3. ***What do you feel would be important in determining relevance of the passport for the CoP members?***

## **Evaluate the Resource and the Process to use the Resource**

The audio presentation explains informal and formal methods of trying out and evaluating the resources and process. Appendix A includes the overview and instructions for using the personal health passport with individuals and groups. Appendix B is a sample feedback form to document the staff's evaluation of the process.

### **Discussion questions:**

- 4. Do you think the trial of the use of the passport, described in the audio presentation, would be feasible in your organization? Why or why not?***
- 5. What education, training and support would likely make the trial more effective?***
- 6. What formal or informal methods have you used to test a resource or procedure you have developed? How did you pass on what you have learned?***

## **Strategies for maintaining relationships among members**

The audio presentation explains the challenges of maintaining relationships when you are working to tight timelines. It is the role of the facilitator to manage the process. An important aspect of the role is to recognize the need for and call for time to reflect on accomplishments. Review the roles of facilitator and knowledge broker identified by Garcia and Dorohovich (2005) included in module 1.

Another perspective on the importance of relationships and trust is presented in a PowerPoint presentation "Reaching for knowledge in unison" by Barwick, Peters, Barwick & Boydell (2008). The presentation provides the initial results from their work with 117 Ontario community mental health organizations comprising over 5,000 practitioners in communities of practice. Participating organizations had been mandated since 2000 to adopt an electronic version of a standardized outcome measurement tool to monitor client response to treatment and measure service outcomes. The presentation can be viewed at:

<http://www.cebm.net/index.aspx?o=2146>.

The final report by Barwick, Peters & Boydell, (2009) is available at:

<http://www.ncbi.nlm.nih.gov/pmc/articles/PMC2651208/>

**Discussion question:**

***7. What do you feel would be the important responsibilities of the facilitator during this period?***

**Plan for administrative tasks**

The audio presentation explains two important administrative tasks for this phase:

- a) consider formation of a smaller work group, or increase in time and/or length of meetings to accommodate requirements for trying out the resources and process,
- b) accommodate increase in exchange of information among members.

**Discussion question:**

***8. How would the facilitator determine that changes needed to be made in meeting times or methods of communication?***

**Preparation for Module 5**

1. Review the discussions from this module within your organization or team. Document questions or comments that you can post or bring up at next focused discussion.
2. Review materials and discussion questions for Module 5, including discussing questions with others. Post responses on website two days before Module 5 workshop.

## References

- Barwick, M., Peters, J. & Boydell, K. (2009) Getting to uptake: Do communities of practice support the implementation of evidence-based practice? *J Can Acad Child Adolesc Psychiatry*, 18(1). Retrieved from <http://www.ncbi.nlm.nih.gov/pmc/articles/PMC2651208/>
- Barwick, M., Peters, J., Barwick, A., & Boydell, A. (2008). Reaching for knowledge in unison. Retrieved from at <http://www.cebm.net/index.aspx?o=2146>
- Garcia J & Dorohovich M. (2005). The truth about building and maintaining successful communities of practice. *Defense Acquisition Journal Review* 12 (1), 19-33. Retrieved from Defense Acquisition University Press Web site: <http://www.dau.mil/pubs/arq/2005arq/2005arq-38/Dorohovich-pb1.pd>
- National Institute of Cancer Research (2004). Making Health Communication Programs Work. Retrieved from <http://www.cancer.gov/pinkbook/page4>.
- The Health Communication Unit at the University (THCU). (2009). THCU Resource library. Retrieved from [http://www.thcu.ca/infoandresources/resource\\_display.cfm?res\\_typeID=5](http://www.thcu.ca/infoandresources/resource_display.cfm?res_typeID=5)

## **Appendix A - List of Discussion Questions**

1. *What aspects of the personal health passport could be used to illustrate specific CCHN Standards?*
2. *What type of evidence was used to develop the passport?*
3. *What do you feel would be important in determining relevance of the passport for the CoP members?*
4. *Do you think the trial of the use of the passport, described in the audio presentation, would be feasible in your organization? Why or why not?*
5. *What education, training and support would likely make the trial more effective?*
6. *What formal or informal methods have you used to test a resource or procedure you have developed? How did you pass on what you have learned?*
7. *What do you feel would be the important responsibilities of the facilitator during this period?*
8. *How would the facilitator determine that changes needed to be made in meeting times or methods of communication?*

## **Appendix B**

### **Overview and Instructions for using the Personal Health Passport with Clients**

**Note: This information without the instructions for the tryout is also included in the workshop in Module 5**

The idea of a health passport was born at a workshop in Cornwall in January 2008. Nurses working in public health, home health, case management, community health centres, and community health nursing education determined that adults in the Cornwall area needed a passport to help them keep healthy or improve their health. The passport includes health information, problem solving tools, and places to record personal information.

**Section A** provides information on areas to address to improve health and prevent illness. The section begins with information on eating, activity, rest, and relationships including what to enjoy, what to avoid, options for change, and benefits. The section ends with health practices that prevent or reduce the occurrence of injury or disease, or increase early detection.

**Section B** provides self-management approaches and tools for people to use to improve health and manage a chronic illness. The purpose of the section is to encourage people to take action to improve their health either on their own, in a group, or with the assistance of their family or practitioners. Near the end of the section, the focus shifts to working with health care professionals to stay healthy with a chronic disease.

**Section C** provides forms for people to keep track of their health information. The form on the inside back cover is to document information for emergency situations.

### **Tryout of Health Passport**

Time period: To be determined by organization- suggest at least 6 weeks.

The purpose of this tryout is for quality assurance to determine the usefulness of the resource and to make any changes if necessary.

## Instructions for health care staff

1. Introduce the tryout of the health passport to clients:
  - a. Explain that you are trying out the passport to see if it would be useful to you when you are talking with clients. Include that you will be keeping track of things such as the age of people and if they find the information in the passport useful. Also indicate that their name will not be included.
  - b. If the passport is found to be useful, it could possibly be available in a few months after more testing.
  - c. Ask if they are willing to try using the passport with you. If they say yes, tell them they will be able to keep the passport and can fill in their name.
2. Please initiate a form for each individual or group when you use the Health Passport. Use the same form on subsequent visits. Use a code only you can understand to track the same person or group over more than one visit.
3. Submit the evaluation form at the end of the try out period.

## Using the passport to work with clients

The passport can be used with individuals or groups in many different ways, depending on the nature of your practice. It is not meant to be a comprehensive guide, rather it is a tool to encourage dialogue on staying healthy with or without a chronic illness. While the passport is simple enough for most people to understand, many people would benefit from an introduction to the passport by health professionals.

***Working with an individual.*** One way to introduce the passport would be to explain that Section A contains health topics they might like to look at, either with you, or on their own. A second step could be to have them look at page 25 (see example on p. 12 below) to consider topics they might like to work on. Or, turn to a topic that has already come up in discussion and point out they can get information on other topics in Section A. The pages following page 25 will help you in assisting them in developing and carrying out a plan on a topic they have selected. In the home, home health nurses and case managers could both work with the passport. If they don't automatically put their name on the front cover, you might encourage them to do so.



After looking through the passport, and considering the characteristics of your client, you might want to read and discuss the scenario on page 23 and 24. Another option could be identifying the people in their life using the form on page 37. For someone else, the choice might be to include their 'over the counter' medications, vitamins along with their meds from the pharmacist or immunizations on page 44. The important thing is to use the passport together, complete some information in it, even if it is the date and time of their next appointment. For their next visit you might ask them to complete the emergency information on the inside back cover. On subsequent visits, you can work with them on their plan and progress in following the plan.

**Working with a group.** At the first meeting of the group, you could distribute the passports and explain that you will be using the passport to identify the topics that are important to the group. You could use or adapt the following procedure to determine topics that are interesting to the group:

- a. Ask group members what they do to stay healthy and either:
  - i. Write responses on flip chart,
  - ii. Ask them to quickly look through Section A and note a topic that might interest them,
  - iii. Ask them to turn to page 25 (see example on p. 12 below). If the topic is there, have them circle it. If they have another topic, write it in.
- b. Ask each person for their topic (one or two?).
- c. Identify the most popular topic to the group.

After they are aware of the topic, ask them to look at that topic in section A. You could lead them in a discussion of the information either at that meeting or the next. During subsequent meetings, work with the group on developing a plan either on a topic of interest to the whole group, or to an individual in the group. Using the example of the group topic, explain the information on pages 26 to 30 and the blank forms on pages 38 and 39. Once they have developed a plan, include time each session to discuss their progress in using the plan. Another important topic is how to discuss their health care and plan with their health care practitioners (physician, nurse practitioner, nurse, dietician, physiotherapist) given on pages 31 to 33.

Explain to them that the passport belongs to them, suggest they write their name on the front, so they can use the passport to address their own topic. Encourage them to bring the passport to each meeting and to appointments with health professions so they can discuss their progress.

## Appendix C

### Sample Feedback Form for Health Passport

Please initiate a form for each individual or group when you use the Health Passport. Use the same form on subsequent visits. Use a code only you can understand to track the same person or group over more than one visit.

1. Client Information:

Individual \_\_\_\_\_ Group \_\_\_\_\_ Number of participants \_\_\_\_\_  
Language:  
English \_\_\_\_\_ French \_\_\_\_\_  
Male \_\_\_\_\_ Female \_\_\_\_\_ Age: 20-64 \_\_\_\_\_ 65+ \_\_\_\_\_

2. Context of Interaction: *Check all that apply*

- a. Routine follow up of a chronic condition \_\_\_\_\_
- b. Acute illness \_\_\_\_\_
- c. Annual medical \_\_\_\_\_
- d. Group — specify type, e.g. Chronic disease prevention \_\_\_\_\_
- e. Other \_\_\_\_\_

3. Which parts of the Health Passport did you use with client(s)? Check all that apply.

- a. Section A — give topic/page \_\_\_\_\_
- b. Section B Problem solving step/page \_\_\_\_\_
- c. Section C Information Sheet \_\_\_\_\_

4. Did the person or group members have the passport at subsequent appointments or group meetings?

- a. 2<sup>nd</sup> appointment/group: Yes \_\_\_\_, % with passport \_\_\_\_\_ No \_\_
- b. 3<sup>rd</sup> appointment/group: Yes \_\_\_\_, % with passport \_\_\_\_\_ No \_\_
- c. 4<sup>th</sup> appointment/group: Yes \_\_\_\_, % with passport \_\_\_\_\_ No \_\_
- d. 5<sup>th</sup> appointment/group: Yes \_\_\_\_, % with passport \_\_\_\_\_ No \_\_
- e. 6<sup>th</sup> appointment/group: Yes \_\_\_\_, % with passport \_\_\_\_\_ No \_\_

5. How satisfied were you on using the passport with this particular client/ client group?

*Please respond on a scale of 1-5, where 1=not at all satisfied 2=somewhat satisfied 3=moderately satisfied 4=very satisfied 5=extremely satisfied*

<b>How satisfied were you with...</b>	<b>1 Not</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5 Very</b>	<b>N/A</b>	<b>Comments</b>
a. The ease of introducing the passport							
b. Being able to find a suitable health topic							
c. The size of the print for your client							
d. The client's ability to understand the content							
e. The client's interest in the information							
The potential of the passport for you to:							
i Introduce health topics							
ii Facilitate communication with the client							
iii Provide consistent health messaging							
iv Make good use of your time							

6. If the opportunity arose, would you use the Health Passport again with this client? Yes\_\_\_\_\_ No\_\_\_\_\_

If no, please explain \_\_\_\_\_

7. What if anything would you do differently the next time you use the passport?

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8. If you were able to use the passport with the individual or group more than once, did their response or interest change?

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9. Did you discuss using the passport with other staff? Yes\_\_\_\_\_ No\_\_\_\_\_

If yes, what did you find useful about the discussions?

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If no, please explain what would make it easier for you to have the discussions with others.

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10. What suggestions do you have for increasing the use of the passports within the organization?

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***Thank you for trying out the Health Passport!***