

QUALITY HEALTH STRATEGIES

**Moderator: Jackie Hairston
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1:14 pm CT**

Operator: Ladies and gentlemen. Thank you for standing by and welcome to the Consistent Assignment webinar. During the presentation, all participants will be in a listen only mode.

Afterwards, we will conduct a question and answer session. At that time, if you have a question, please press the 1 followed by the 4 on your telephone.

If at any time during the conference you need to reach an operator, please press star 0. As a reminder, this conference is being recorded Thursday, April 18, 2013.

It is now my pleasure to turn the conference over to Jackie Hairston, Project Manager, Delmarva Foundation. Please go ahead.

Jackie Hairston: Thank you. Thank you. Good afternoon and welcome to all of you today.

We want to welcome you to our call on consistent assignment sponsored by the Advancing Excellence Maryland LANE. As you were told, my name is Jackie Hairston. I'm the Project Manager here at Delmarva Foundation.

And I'm here today - we have a panel of distinguished speakers to speak with you today, and they will be talking on the benefits of implementing a consistent assignment staffing pattern. We'll start off the presentation with Alice Hedt from the Maryland State Long Term Care Ombudsman Office.

She's responsible for the oversight of the ombudsman working in the Maryland - in the state of Maryland. Then we'll hear from Dr. Charlotte Eliopoulos, Executive Director of the American Association for Long Term Nursing and a member of the Advancing Excellence Collaborative Board.

She will guide you through the many reasons nursing homes should embrace a consistent assignment staffing pattern. And to give us the provider's point of view, we have Jimmy Harrington, Vice President of Clinical Services with FutureCare Health and Management Corporation.

So thanks to all of you today for developing and presenting this information, so we're going to be - I'll be turning it over then to Alice Hedt, who will be giving us a few words. Alice?

Alice Hedt: Good afternoon, everybody and thank you for sharing your valuable time with us.

We know you have many opportunities to improve quality of care and quality of life and we thank you for taking this opportunity to learn about consistent assignment. There are a lot of strategies to improve care in nursing homes. QAPI is coming down the road with CMS.

The Coalition to Improve Dementia Care exists in Maryland and in the United States. And, of course, culture change. But in Maryland, our Advancing

Excellence Campaign made the decision to focus our goal on consistent assignment. So we are very glad that you're with us because we believe consistent assignment, as part of advancing excellence, can make nursing homes a better place to live and work and visit.

The Advancing Excellence Campaign now has 30 national groups that are members. Those groups include medical directors, nurses, consumers, and providers. So all of the materials involved in advancing excellence, you can be assured, have been well vetted by many experts.

Over 9000 nursing homes participate. That's 58% of the nursing homes in the United States. And all of the tools have been tested as effective resources. And a very important thing to point out is that all of the tools are available to you at no cost. Those are the tools related to the consistent assignment goal, but also the tools related to all of the goals.

In Maryland, we incorporate the Advancing Excellence Campaign through a LANE. A LANE is a Local Area Network for Excellence, and we work to promote advancing excellence, but also other initiatives as well. You'll see here the wide variety of groups and associations that are part of our LANE. And if you're interested in joining the LANE, feel free to contact me or any of the participants on this call and we would welcome you joining us.

Nursing home residents tell ombudsman and the research indicates that the most important things to their life is twofold.

First of all, that facilities and staff responsiveness when they have requests, and secondly the relationship that they have with the staff who work in the facilities.

And we believe that consistent assignment can successfully impact both of these things that are so important to residents. I want to share with you two quotes of residents since I've been here in Maryland as the State Ombudsman. A 53 year old woman, who's been in a nursing home multiple times said, I want those who care for me to know me and to know my name. I'm not just a task to be completed.

Another woman aged 70, who lives in a nursing home that has consistent assignment says, I now know my caregivers and they know me. So welcome to this call and I'm going to turn this session over at this point to our expert, Charlotte.

Charlotte Eliopoulos: Thank you, Alice. I appreciate that.

And I - let me make sure I got everything here. The purpose of this webinar, very briefly, is to help understand - help everybody understand what's meant by consistent assignment. To talk about some of the advantages to all parties involved, and describe actions to actually implement a consistent assignment approach in your given nursing home.

Okay. I am finding that this is not advancing for me. I need the next slide and it's not going anywhere for me. Somebody help me with that?

Operator: You have to left click on the slide first, and then you can use your down or right arrow key to advance.

Charlotte Eliopoulos: Okay. I've done that and it just still - but let me try it again. There we go. Great. Thank you. And a thank you for your patience while the technologically challenged among us get this done.

As Alice said, this is a goal in the Advancing Excellence Campaign and the Advancing Excellence Campaign this year has come out with two sets of goals, process goals and clinical outcome goals. And the goals that you see listed on this slide are the process goals which do include the increasing use of consistent assignment, which is what we're going to explore today.

The clinical goals are outlined on this slide and take in account things like pressure ulcers, infections, and so on. And this year the nursing homes will be asked to select one of each of these goals as they track their progress and participate in the campaign. Okay.

So it's probably helpful to start all together in terms of defining what we mean by consistent assignment. And you'll find various definitions out there, some of which say it's when 80% of the time the same people are assigned to the same residents and others will say most of the time or when, you know, 80% of the staff are assigned consistently.

In general, what has been adopted by the Advancing Excellence Campaign, and probably the easiest definition to use, is when residents are cared for by the same group of staff most of the time on a regular basis. Well why is this important, you know, why do we even worry about this?

Well, you may find within in your own nursing homes that there are areas that need to be improved that consistent assignment can address. For instance, you may recognize that you have a need for improvement in consistency assignment because families are complaining that CNAs don't seem to be familiar with their residents' preferences, or that the CNAs have been telling the charge nurses that the previous shift is not doing the work the way it should be done and leaving work for them.

Or residents are asking what happened to certain CNAs that they like or residents have expressed disappointment that things aren't being done the way they prefer or the way they're used to having things done. You may find absenteeism rates are high or you may find in tracking consistent assignment with the advancing excellence tool, that you see that you're not doing things as well as other nursing homes in your area.

And one of the nice things about the campaign when you enter your data, you're able then to see how you compare to other nursing homes in the area as well as nationwide. So it matters that there be improvements and there are benefits to improving consistent assignment.

There are advantages to consistently assigning staff for residents in that they don't have to explain to new caregivers how to care for them day after day. Staff can anticipate residents' needs and respond more quickly, confidently, and naturally when they know the residents.

Residents are more comfortable with the intimate aspects of care when they know their caregivers. Change is difficult for residents with dementias, and reducing the number of caregivers they have to relate to gives them more security and reduces their anxieties.

Consistent assignment means residents can have stronger relationships with staff. And in nursing homes with stable leadership, care really is better. There are much better outcomes. This benefits the staff as well. The staff can know what residents want and need and can give better care and be more organized in their work with key members that they know.

Staff is less likely to be working with temporary nurses or CNAs who are not as familiar with the nursing home routine. Turnover is reduced if staff has greater work satisfaction and are going to be less likely to leave.

And the nursing home benefits in that a stable, consistently assigned staff reduces the cost involved in repeatedly advertising, interviewing, hiring, and training new staff. Nursing homes with satisfied staff members are able to recruit other good workers and better survey outcomes and quality measures are achieved, along with improvements in family satisfaction rates.

Interestingly, even with verbal recognition, rotating staff around make CNAs feel less valued for their skill and knowledge. CNAs define good care giving as based on the establishment and maintenance of good relationships with residents.

They felt that any disruption to these relationships was detrimental to the quality of the care provided and to the quality of residents' lives. In a study that compared two nursing homes with permanent assignments to two homes with rotating assignments, it was found that residents living in the permanent assignment nursing homes received significant higher ratings, personal appearance, and hygiene than residents in the rotating home.

Also, the nursing assistants working in the permanent assignment homes reported higher levels of job satisfaction than those working in homes where assignments were rotated. So with all of this said, is this a problem for you? It's important to begin by assessing your work place.

As mentioned earlier, there are certain signs that there is a lack of consistent assignment, such as resident and family complaints, CNA complaints, residents asking, you know, where their favorite caregivers are or that you're

finding when you're filling out assignments, that the level of consistency isn't quite meeting the mark that you would hope for.

And also you may find that when - if you're tracking this with the advancing excellence tool, that you're not doing as well as some of the other homes in your area. Now the Advancing Excellence Campaign offers tools to assist you in analysis. And analysis is different layers of your progress. And you can kind of approach the root cause analysis of these different layers.

In the first level of analysis, you're going to determine if you have a clear policy about the consistency of assignment, and if that policy is known and accepted throughout your facility, you know, do you routinely review consistency of assignment with the charge nurses, supervisors, schedulers, everybody else who would need to have a role in scheduling.

Are there unit level policies or practices that undermine consistent assignments? For instance, people making changes to the assignments after a master plan has been developed. Is there a high degree of turnover or absenteeism that challenges the ability to do consistent assignments? And do we actually record by actual practice or scheduled worker? How are we keeping track of all of this?

Progressing to the next level of analysis, you'd evaluate if there are any variations in consistency of assignment by unit, shift, day of the week, time of the year, or by charge nurse on the unit who may do a little tweaking of the assignments. Are team assignments decreasing consistency of assignments?

Do the units have a policy of rotating workers that would work against consistent assignment? And who makes the assignments and is this consistent across shifts, units, and days? Finally, the analysis goes deeper in exploring is

consistency different with fluctuating staffing levels, and what's the reason for this and what has been tried to improve consistency?

Have discussions been held with staff at all levels about the reasons for consistent assignment? Does everybody get it in other words and understand the purpose behind it? Have staff at all levels been able to voice any concerns they have about consistent assignment?

For instance, issues sometimes come up like well, who gets the heavy care residents all the time or those with the big behavioral problems? Do the people making assignments have a real commitment to this or are they giving lip service and doing something different when they're out there on their own?

Do front line staff have input into the assignments? Do residents have input into who they want to have care for them? And do the nurses have input? So the question is not so much if you should switch to consistent assignment but how you go about doing it. And let's look at some of the steps in the process. Very basic steps.

You kind of begin by holding a meeting with the staff who you expect to be consistently working together. You ask that team to make a ratings scale with the level of difficulty for each resident. Now there certainly are a lot of resident acuity scales out there, but if you can develop something that's something simple and workable for your unique setting, that probably will be a little bit more successful.

Some nursing homes have done a scale of one to five based on the care giving challenge presented and asked the team of direct care staff how complex, how difficult is this resident on the scale of one to five. And, you know, most times the staff can handle that kind of ratings scale.

You then have the team discuss and rate each resident using the scale. Have the staff then select assignments, making sure that all assignments have a fair mix of residents by degree of difficulty and are well matched based on which staff had the best relationships with residents. I would defer to the residents' preferences in regard to this whenever you can.

You then can double up residents that the staff may find physically or emotionally taxing and let staff work in pairs with those particular residents. And use a team process to monitor the workload and make adjustments as needed and as residents move out, come in, or have changes in conditions.

It's very helpful to evaluate this frequently because things do change. Now I don't have to tell you it's not always going to run smoothly and perfectly. Nursing home life isn't like that as we all well know, so you'll need to trouble shoot, to regularly talk through any situations that staff may find challenging so that staff have assistance from coworkers and other clinicians to develop strategies to resolve these challenges.

You know, make consistent assignments of backups for when the first line dedicates a staff person has time off. Give a good orientation to any staff serving as a backup and assure a good introduction is made between that backup staff person and resident if they don't know each other.

Maintain consistency when there are staff absences and this is the time to walk the talk. If one group of assignments is affected by an absence, don't compound this by taking another CNA away from her assignment to fill the gap. This creates two groups of residents without dedicated caregivers.

Instead, have an all hands on deck approach where department heads and other members of the nursing team help out at the busiest times. For instance, some nursing homes have trained all people who work in the nursing home to help with feeding and other activities so that if they're in a crunch, you can have a good backup without depleting the direct care staff.

Ask, you know, the food service and housekeeping staff to pitch in at mealtimes and other busy times. And indicate your dedication to consistent assignment by your actions. Very important to develop a pool of consistent backups who know the residents that they're going to be asked to care for.

Maintain the consistency also by having a longer huddle at the beginning of the shift - the staff meetings or huddles, however you do this, to help any nursing assistant who's serving as a substitute to be made familiar with the residents they'll be caring for.

Make the staff assignments by resident group so that at least the same group of CNAs can back each other up. Encourage them to work together, to work out schedule substitutions for each other so that the residents ultimately are going to have consistency. And it's also useful to involve the dedicated CNAs in the care conferences.

And practical steps can help to achieve this. For instance, having the conference in a location that's easy for the CNAs to get to versus in some office that, you know, a 15 minute walk away from their location. When a CNA's resident is having a care conference, let the CNA know that at the beginning of the shift at the shift huddle.

Have the CNAs routinely share about their residents at shift huddles so they become used to giving these little status reports. Provide guidance to the

CNAs as to the types of information that's useful to share. This is a skill that needs to be nurtured and developed in many of our CNAs.

Have members of the interdisciplinary team use nontechnical language. And when CNAs bring issues up about how residents are doing, pay attention to this. Discuss it, offer explanations. And follow up, closing the loop so that CNAs know that the information they share is used and so they know what they are seeing.

Now as you can imagine, in addition to helping to facilitate the process of consistent assignment, this empowers the direct care staff, which enhances their jobs satisfaction. Okay. Well, with this mind, it would be helpful to have an example of how one of our colleagues, Jimmy Harrington, has implemented this so I'm going to turn it over to Jimmy.

Jimmy Harrington: Good afternoon, everyone. I'm going to briefly highlight pointers for the success of rolling out consistent assignment. I would also highly encourage you to view the video from the facility in Michigan that highlights their experience with consistent assignment.

You can find a link to this video at the bottom portion of the Advancing Excellence homepage website.

I would encourage you all to designate a consistent assignment champion. You want to choose a highly organized, detail oriented person, perhaps a staffing coordinator. They typically do well at this task because that's what they do every day. Or you can also use a unit clerk.

You want to make sure that you allow time for this person because they will be responsible for keeping the worksheets and the website up-to-date. And

keep in mind that this person is not going to have all the duties and responsibilities for consistent assignment. Because as Charlotte said, it takes a team. This person will coordinate with the DON and unit managers with any issues.

You want to make sure that it's a win-win for the staff, the residents, and the facility. Everyone has their own personality and work preferences and you want to match staff personalities with the type of unit. Staff that like frequent changes, variability in the routine, place them on a short stay neighborhood. Staff that like routines with stability, place them on a long stay neighborhood.

Choosing neighborhoods. Start small and slow. You want to start on one unit or hallway or pick maybe just a shift. You're going to start with a neighborhood that has continuity of staff and residents that's going to enable you to focus on the quality of the program. It's easier to manage the logistics and become more familiar with the program.

You're going to build upon successes. Remember when you're choosing your neighborhood to choose the appropriate worksheet on the website. You're going to expand consistent assignment program by slowly adding neighborhoods and or shifts. You're going to aim for quality, not speed. It may take several months to complete the entire facility.

I know all of us that work in long term care assisted living facilities, we want everything done yesterday. But keep in mind it's important to do it right and the quality is more important than the speed. You're going to track your progress and you're going to compare your success to your target goal.

And you're going to expand your campaign as your targets are reached. Keep in mind that it's important that we award success. You're going to have

competitions for achieving targets by areas. You're going to give out awards and plaques, certificates. You want to use items that are highly visible so staff can display them and be proud of them.

And on the web there's going to be resources for this. As time goes on, they're going to update these resources. So remember, as with all things that we do well, it's important to celebrate success. And with this, I'm going to turn it over to Miss Jackie Hairston for some closing comments and then questions.

Jackie Hairston: Okay. Well that - thank you, all of you, thanks for our panel today for that informative overview of consistent assignment and we want to open up, at this time, for any questions from the audience. So I'm going to ask if our operator could remind folks of how to ask a question.

Operator: My pleasure. Ladies and gentlemen via the phone lines, you can press the 1 followed by the 4 on your telephone. You will hear a three tone prompt to acknowledge your request. If your question has been answered and you would like withdraw your registration, please press the 1 followed by the 3.

If you're using a speaker phone, please lift your handset before entering your request. One moment, please, for our first question. Once again, ladies and gentlemen. It is the 1 followed by the 4 if you would like to register a question via the phone lines. Miss Hairston, please go ahead.

Jackie Hairston: Yes, I have a question probably for Jimmy or anyone on the panel. Oftentimes what I hear as I'm working with nursing homes in the field is that they get resistance from staff because they do feel that consistent assignment means that they will always have a difficult caseload. And I was just wondering if any of you have had the experience on how to kind of turn that thinking

around or Jimmy, did you have any of that resistance when you were implementing consistent assignment?

Jimmy Harrington: Yes, actually I have had that issue come up. And what I found more times than not, patients become less difficult if they can anticipate the staff members providing care for them and...

Jackie Hairston: Right.

Jimmy Harrington: ...their care need got more consistently. And the staff developed better relationships with the resident and become more accepting of each other and work better together as time goes on.

And there are times where, like Charlotte said, you may need to pair up people to work with residents because you don't want to put an employee in a situation where they snap. You want to be able to provide some relief for them in those tense situations.

Jackie Hairston: Okay. Okay. I will keep that in mind as I'm out there talking with facilities. Any other questions?

Operator: There are none at this time but I have a quick reminder. It is the 1 followed by the 4 if you'd like to register a question. One moment, please. And we have a question from (Jean O'Neil). Please go ahead.

(Jean O'Neil): Yes. I'm wondering if the part about the staff choosing their assignments as one possibility, I'm just wondering about the logistics of it. What if they want a resident that's in one section and then a resident who's in another section? What is the plan in that rather than move the residents?

Charlotte Eliopoulos: And again, Jimmy, I don't know if you want to take this. This is Charlotte talking now. I think this is part of some of the ground rules to get established before these programs are implemented.

And that is staff is going to be working as a team on this particular unit with these, you know, 15 or 20 beds or whatever you're going to designate and you set up some of the ground rules that limit the geographic, for instance, you know, kind of define the areas. Because you're right, there will be inefficiencies if they're running to different halls or whatever to try to make this happen. So that's part of what you can help determine and sketch out in advance if you can anticipate that being a problem. And you're absolutely right...

Jimmy Harrington: And I think the other is, Charlotte, that would be helpful is when you choose neighborhoods, start small and add as you go.

Charlotte Eliopoulos: Yes.

Jimmy Harrington: And then when you assign the caregivers for that neighborhood, you don't have the sense of the staff want to reach into the next neighborhood.

Woman: We've had calls like this and training sessions where the people...

Jackie Hairston: Any other questions?

Operator: There are. And the next question comes from the line of (Annie Green). Please go ahead.

(Annie Green): Thank you. Good afternoon and thank you to the panelists for providing such a wonderful presentation. Charlotte, Alice, and Jimmy, thank you so much.

We are currently in the process of using consistent assignments. And what we have found, residents who are challenging, to pair our GNAs up and make sure that it's resident focused.

There are some residents that choose not to get up too early and there are some residents that prefer to get up early. And we have found that when we pair our GNAs up with those residents who may be a little challenging, it really helps that resident and it makes them feel much more comfortable.

Charlotte Eliopoulos: That's a great strategy to use. It really is. The paring up really is a - I think there's been a lot of reported success in that being a wonderful strategy for your, quote, heavy care type of resident or those with the more challenging behaviors.

(Annie Green): Thank you.

Alice Hedt: This is Alice, can you hear me?

Dr. Charlotte Eliopoulos: Yes.

Jackie Hairston: Yes.

Jimmy Harrington: Yes, we can hear you.

Alice Hedt: Yes, I just want to share that on the Advancing Excellence website, besides the tools for tracking consistent assignment, there are also tools for CNAs and for residents and their family members. And that using those tools to make sure that residents, family members, CNAs, everybody is sort of onboard with this concept can be really helpful. So I would encourage you all to look for

those tools for consumers and family members while you're doing the tracking of your data.

Operator: Thank you. And our next question comes from (Meg Victoria Sise). Please go ahead.

(Meg Victoria Sise): How you doing? I wanted to know if it's possible to have a print out of this material that was used in this section? Is there a way we can print it out for references?

Jackie Hairston: Yes. The materials are posted on the Delmarva website, www.mdqio.org. We had them posted there so you could print them off prior to the call so you could have them, you know, as the presenters were speaking. But they will be posted there so that you can download them and have copies of them.

(Meg Victoria Sise): I'm sorry. Can you go through the website one more time? ww...

Jackie Hairston: www.md - md. M as in Mary, D as in David, qio.org, O-R-G.

(Meg Victoria Sise): Okay. Thank you so much.

Jackie Hairston: Okay?

(Meg Victoria Sise): Thank you.

Jackie Hairston: No problem.

Operator: Thank you, ladies and gentlemen. As a reminder, it is a 1, 4 for a question or comment. And we have no further questions via the phone lines.

Jackie Hairston: Okay. Well, I just want to say thanks to our panel today for the information that you provided to us. We have some great questions from the audience and we thank you for your active participation.

We hope you have gained a greater understanding of what is meant by consistent assignment and the advantages to your residents and staff. So as you begin to implement consistent assignment in your nursing homes, don't forget to use the available tools on the Advancing Excellence website, which is www.nhqualitycampaign.org.

You will find resources to help you get started with the implementation of consistent assignment, and to track your progress as you go along the way along your journey. We want to thank everyone for joining us. And this ends today's call. Thank you, everyone.

Operator: Thank you, ladies and gentlemen. That does conclude the webinar for today. We thank you for your participation and ask that you please disconnect all lines. Thank you and have a good day.

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