



MANITOBA INSTITUTE
FOR PATIENT SAFETY

Self-Advocacy For Everyone (**SAFE**) Toolkit

Leader's Guide



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Background and Rationale

What is the Manitoba Institute for Patient Safety?

The Manitoba Institute for Patient Safety (MIPS) is a non-profit organization that promotes patient safety. The MIPS SAFE Toolkit is for Manitobans who want to be more active in conversations and decisions about their healthcare.

Why is the SAFE Toolkit important?

The healthcare system is complex. It can be scary to some people. Everyone has a role to play in the safety of patients. Self-advocacy refers to people speaking up for themselves.

The MIPS Self-Advocacy For Everyone (SAFE) Toolkit is for people who want to be engaged more actively in their healthcare. The SAFE Toolkit has information, tips and resources that can help

What are the goals of the toolkit?

The goals are to:

- Promote clear, common messages to the public and healthcare providers on patient safety topics
- Provide a patient safety resource for Manitobans
- Promote an approach to healthcare delivery that involves patients and families as key members of their healthcare team

people learn to be more involved in their healthcare.

What are the topics covered in the toolkit?

It consists of key patient safety topics in summary and full version formats, and this Leader's Guide. Topics include:

1. Know Your Patient Rights	8. Prepare for Surgery
2. Choose Your Patient Advocate	9. Prevent Falls
3. Know Your Healthcare Plan	10. Know The Process when Harm Happens
4. Access Your Medical Records	11. Know The Patient Safety Contacts
5. Talk with Your Doctor	12. Know The Steps in Stating Your Concerns
6. Work with Your Pharmacist	13. Know Some Patient Safety Definitions
7. Prepare for Your Stay in Hospital	

The MIPS SAFE Toolkit topics were developed with the input of healthcare providers, the MIPS Patient Advisory Committee (M-PAC), members of the public, and numerous print resources.

Who can use these resources?

The SAFE Toolkit may be used as a structured program or individually by people who want to learn on their own. The target audiences include:

- Patients, families and patient advocates
- General public and community leaders
- Healthcare providers

How to Use the Toolkit

- Go to www.safetoask.ca.
- Review the Table of Contents.
- Choose the topics that best meet your needs.
- Check Resources at the end of each full version format to learn more.
- Print the page(s) of interest to you.
- Tell your family and friends about the toolkit.
- Review this Leader's Guide, if you want to lead small group sessions for others.

Purposes of the Leader's Guide

- To inform potential leaders about the toolkit's content, resources and how to implement sessions
- To increase the number of leaders offering structured sessions on patient safety topics to Manitobans
- To increase the dialogue around patient safety topics among Manitobans

Getting Started: How to Plan and Deliver Structured Sessions

Overview

Plan your program using the Leader's Guide.

This Leader's Guide gives a step-by-step checklist for planning and delivering a 60- to 90- minute structured session. The checklist provides:

- Steps, times, tasks and tips
- Resources for participants
- Summaries of:
 - Introduction to Self-Advocacy For Everyone (SAFE) Toolkit
 - Thirteen patient safety topics
- Full versions of eleven patient safety topics
- Participant Evaluation Form
- Additional resources for leaders
 - Participant Sign-In Sheet
 - Leader Log and Feedback Form for tracking your activities
 - Guidelines for Effective Leaders
 - Adults and Effective Sessions
 - Potential Challenges and How to Handle Groups
 - Sample Poster or E-Mail Message for advertising the program
- Personal Notes Section for leaders to record reminders and tips to themselves when leading the sessions

Leader's Checklist

Steps	Time	Tasks	Tips	Resources	Personal Notes
<p>1. Advertise the Session</p>	<p>May take 2-3 hours At least 2-3 weeks ahead</p>	<ul style="list-style-type: none"> • Call local groups and offer to deliver a 60-90 minute structured session. • Post information in public places like stores, libraries, churches, doctor offices, pharmacies, banks, legions. • Ask local papers and radio stations for free advertising. • Ask local TV channels to help. • Send e-mail notices to key groups. • Use municipal/community, economic development websites to advertise. • Ask other groups to promote your sessions. 	<ul style="list-style-type: none"> • Select meeting place/time that works for most people. • Go where groups already exist. • Consider co-hosting with another person if that's more comfortable. • Arrange for refreshments and snack. • Check out free spaces - church halls, community centres. • Approach service groups to piggy back their meetings. • As people sign up, suggest they bring a friend or family member. • Call local volunteers to assist with promotion, room set up and help during the session. • Ask volunteers to make reminder calls to participants a few days before the presentation. 	<p>Appendix G: Sample Poster or E-Mail Message</p>	

Leader's Checklist (continued)

Steps	Time	Tasks	Tips	Resources	Personal Notes
<p>3. Deliver the Session</p>	<p>(Total = 60 – 90 minutes includes coffee break) 8 minutes 5 minutes</p>	<p>Welcome</p> <p>Introductions & Warm Up</p> <ul style="list-style-type: none"> • Leader states her/his name and organization • Ask participants to state first name and why they came to the session. • Thank people for coming out. • State location of washrooms and fire escape route. <p>• Post and review the ground rules. Ground rules: Put on flipchart paper and review with group.</p> <p>• Share goals and process.</p> <p>• Goals: To increase: - awareness about patient safety topics - awareness about MIPS patient safety website and resources - dialogue about patient safety topics</p> <p>• Process: Review each topic to be covered and use discussion questions posted on wall.</p>	<ul style="list-style-type: none"> • Arrive early. Begin on time. • Greet people at door. • Ask people to sign in and pick up handouts. Remind people to take handouts home and share with others. • Remind group: <i>You are the session leader, not a counselor or health expert.</i> Session is informal and open to sharing. Write down questions, if people prefer. • Post ground rules and discussion questions <p>Discussion questions: Print one or more on flipchart paper:</p> <ol style="list-style-type: none"> 1) What is the most important information on this page for you and why? 2) What information is new to you and how will it help you? <ul style="list-style-type: none"> • <i>Reminder:</i> If you can't answer a question, you can offer to find the answer. • Allow time for replies and comments. 	<ul style="list-style-type: none"> • Bring markers for name tags, extra pens and paper. <p>Ground rules:</p> <ul style="list-style-type: none"> • One person speaks at a time. • Group shares time. • Respect everyone's views. • Respect everyone's personal health information that might be shared. • Take charge of your own learning. • Remember to respect other's confidentiality. <p>Flipchart with 1 or 2 discussion questions.</p>	

Leader's Checklist (continued)

Steps	Time	Tasks	Tips	Resources	Personal Notes	
3. Deliver the Session Cont'd	5 minutes	<ul style="list-style-type: none"> • Begin by reviewing introduction to toolkit, purposes of kit and topics for the session. 	<ul style="list-style-type: none"> • Know your audience. • Encourage participants to share their handouts with families and friends. 			
	15-20 minutes	<ul style="list-style-type: none"> • Discuss topic selected. • Allow time to read one page summary. • Present key points to group. • Refer to assigned discussion question. • Ask for 1 or 2 replies to posted question. 				
	5 minutes	Summarize briefly.				
	15 minutes	Coffee break		<ul style="list-style-type: none"> • Allow for refreshment break. 		
	15 -20 minutes	<ul style="list-style-type: none"> • Repeat process above for next selected topic. • Thank people for their answers and comments. • If time, hold a brief discussion on one extra question. • Ask for replies and comments. 	<ul style="list-style-type: none"> • Extra question: Select one – <ol style="list-style-type: none"> 1. What is the most important thing you learned today? 2. In the future, what will you do differently based on what you just learned? 3. Name one patient right you did <i>not</i> know about. 			

Leader's Checklist (continued)

Steps	Time	Tasks	Tips	Resources	Personal Notes
<p>4. End the Session</p>	<p>10 minutes</p>	<ul style="list-style-type: none"> • Ask if any other questions. • Ask: Do you want to attend more sessions? If yes: • Refer to topics listed on Intro to Toolkit • State you will cover 2 topics a session. • Call the name of the topics and number and ask for a show of hands to indicate interest in topic. Record votes on Participant Sign-In Sheet. • Ask if there are some topics they wish to read about on their own. • Set date for next session. • Have folks complete evaluation form. • Thank people for attending. • Remind people: go to MIPS website and read full versions. 	<ul style="list-style-type: none"> • End on time. • Collect Participant Sign-In Sheet. • People do not have to sign evaluation forms. • Collect completed evaluations. • Tell people where public computers are available to print full versions. Suggest if they need help to ask family/friends. 	<p>Appendix A: Participant Sign-In Sheet</p> <p>Topic One: <i>Intro to MIPS SAFE Toolkit</i></p> <p>Appendix B: Participant Evaluation Form</p>	

Leader's Checklist (continued)

Steps	Time	Tasks	Tips	Resources	Personal Notes
<p>5. Follow-Up to Session</p>	<p>30 - 60 minutes</p>	<ul style="list-style-type: none"> • Review Participant Evaluation Forms. • Note any issues of concern. • If you are delivering other sessions: • Confirm how many sessions are needed or you can plan to deliver a set number of sessions. • Note which topics participants are comfortable doing alone (self-directed). • If new participants show up, welcome them to the group. Ask them to read the summaries and full versions of previous topics. Encourage people to ask questions. • Repeat step 2 (Prepare for the Session) and step 3 (Deliver the Session). • Complete Leader Log and Feedback Form and fax to MIPS. • Clean up space, put away tables and chairs. • Send a thank you note to your host. 	<ul style="list-style-type: none"> • Fax concerns/suggestions for new topics/tools to MIPS Fax: 1-204-779-6477 • Use Participant Sign-In Sheet. • People can stay in contact and pick up materials as needed. • Be sensitive to participants' experiences and personal health information shared. 	<p>Other <i>MIPS</i> Resources: ISTA Medication Card, Patient Advocate Form Appendix A: Participant Sign-In Sheet</p> <p>Appendix C: Leader Log and Feedback Form</p>	

Appendix B: Participant Evaluation Form

Topic(s): _____

Date: _____ Leader: _____

Location: _____ Number of participants: _____

Please **check** (✓) responses that reflect your opinions. Thank you.

STATEMENTS	Strongly Agree 1	Agree 2	Disagree 3	Strongly Disagree 4
The presentation was informative.				
The content will be useful.				
The resources are easy to read.				
I am now more aware of how I can be actively involved in my care decisions.				

What content was most useful?

What content was least useful? Why?

Other topics I want to know more about: (Please check as many as apply.)

Topics	Please (✓)	Topics	Please (✓)
1. Know Your Patient Rights		8. Prepare for Surgery	
2. Choose Your Patient Advocate		9. Prevent Falls	
3. Know Your Healthcare Plan		10. Know The Process when Harm Happens	
4. Access Your Medical Records		11. Know The Patient Safety Contacts	
5. Talk with Your Doctor		12. Know The Steps in Stating Your Concerns	
6. Work with Your Pharmacist		13. Know Some Patient Safety Definitions	
7. Prepare for Your Stay in Hospital			

General Comments/Suggestions:

Optional: Your name: _____ Phone number: _____

Please leave this form with the presenter. Thank you for your feedback!

Appendix C: Leader Log and Feedback Form

Instructions: Please complete the log. Please rate (✓) your opinions of the MIPS SAFE Toolkit. Please fax this form to MIPS at: 1-204-779-6477. Thank you!

Session Topics	Date dd/mm/yy	Locations	Number Attendees	Please record summary of responses.			
				1-strongly agree	2-agree	3-disagree	4-strongly disagree
				The presentation was informative.	1 ___ 2 ___ 3 ___ 4 ___		
				The content will be useful.	1 ___ 2 ___ 3 ___ 4 ___		
				The resources are easy to read.	1 ___ 2 ___ 3 ___ 4 ___		
				I am more aware how to get involved.	1 ___ 2 ___ 3 ___ 4 ___		
				The presentation was informative.	1 ___ 2 ___ 3 ___ 4 ___		
				The content will be useful.	1 ___ 2 ___ 3 ___ 4 ___		
				The resources are easy to read.	1 ___ 2 ___ 3 ___ 4 ___		
				I am more aware how to get involved.	1 ___ 2 ___ 3 ___ 4 ___		
				The presentation was informative.	1 ___ 2 ___ 3 ___ 4 ___		
				The content will be useful.	1 ___ 2 ___ 3 ___ 4 ___		
				The resources are easy to read.	1 ___ 2 ___ 3 ___ 4 ___		
				I am more aware how to get involved.	1 ___ 2 ___ 3 ___ 4 ___		
				The presentation was informative.	1 ___ 2 ___ 3 ___ 4 ___		
				The content will be useful.	1 ___ 2 ___ 3 ___ 4 ___		
				The resources are easy to read.	1 ___ 2 ___ 3 ___ 4 ___		
				I am more aware how to get involved.	1 ___ 2 ___ 3 ___ 4 ___		
Parts of Toolkit	Excellent	Very Good	Good	Fair	Poor	Additional Comments	
Leader's Guide Directions							
Summaries of Topics							
Full Versions of Topics							
Participant Evaluation Form							
Advertisement Template							
Leader Awareness Session							

Leader Name: _____ Phone: _____ Location: _____ Email: _____

Appendix D: Guidelines for Effective Leaders

1. Communicate well. Speak clearly and loudly enough so everyone can hear. Be an active listener. Use language that participants will understand.
2. Make eye contact with each participant at different times during the session.
3. Demonstrate open and respectful behaviour with a non-judgmental attitude. Respect each participant's point of view, expect participation and value diverse opinions.
4. Be enthusiastic about the content and the participants. Remember to be welcoming and friendly.
5. Keep the group on track and focused on the topics. Begin and end the sessions on time.
6. Plan to be organized and well-prepared. Read the topics and Leader's Guide before working with groups.
7. Remain flexible and adapt to participants' needs. Take a relaxed but professional approach.
8. Always be honest about what information you do and do not know.
9. Use humour where appropriate.
10. View each participant as an information resource for the larger group. Always involve participants.

Appendix E: Adults and Effective Sessions

Adult participants have years of life experience. Some may have more experience and training than the person who is leading the session. At all times, your participants are peers in the learning process. Know your groups and their needs.

Remember.

1. Adults have first-hand experience and information to share with others. Build on participants' experiences. Allow room for sharing personal experiences to convert them to learning.
2. Adults have pride. Deliver the session in a safe, supportive learning experience that is respectful.
3. Adults have a set values, beliefs and opinions. Respect the experiences and opinions of others.
4. Adults have decisions to make and problems to solve. Create an organized session with clear purpose that allows time for discussion.
5. Adults are self-directed. They apply new information to previous learning and experiences. Let participants take responsibility for their learning. Encourage people to take ownership for their healthcare decisions and to be pro-active. Summarize often to increase retention.
6. Adults have strong feelings about how they prefer to learn. Plan for a successful experience. Ensure the session is useful, rewarding and participants are engaged.
7. Adults can skip certain basics. Help people begin where they are at. Encourage people to find information for dealing with their concerns.

Appendix F: Potential Challenges and How to Handle Groups

You will experience a wide variety of people, with different views and needs, during your sessions. It is important to remain neutral and open. Here are some tips on dealing with potential challenges.

1. The session is dragging on and your group is losing energy or interest.

- Pick up the pace.
- Ask a question and wait for an answer.
- Ask a question of a participant you know will be responsive.
- Give the group a quick stretch break.

2. Participants are not talking/reacting to your questions or comments.

- Ask a question, make eye contact, and wait for a response. Ask a specific person who you know will be responsive if no one answers.
- Use humour. Say, "I'm getting lonely up here. What are your views?"
- Prepare a few of your own questions ahead of time. If the group is quiet say, "One question people might wonder about is how to ask questions of your doctor when appointment time is so limited? Any thoughts on how to deal with this?"
- Ask a question. Then ask for a show of hands. Say, "Would anyone like to share an experience?" Switch the focus or move on to another topic section.

3. A participant tries to take over the discussion.

- Thank that person for the information. Ask if someone else would like to comment.
- Look at other people in the audience.
- Focus on the tasks and time. Say, "We need to move along to finish on time."
- Remind everyone about the ground rules. Examples: One person speaks at a time. The group shares the time. Respect everyone's views. Respect confidentiality.
- Take charge of your own learning.

4. A participant is disruptive (talks when others are speaking, argues).

- Remind everyone of the ground rules – see point 3 above.
- Ask participant to share comments. Have a quick break and regroup.

5. The leader is nervous.

- The more prepared you are, the less nervous you will be.
- Think about other successes you have had.
- Ask other presenters for their tips on dealing with delivery jitters.
- Practice ahead of time to someone at home or an imaginary audience.

6. General rules to follow for dealing with a challenge.

- Identify the problem/issue.
- Decide who owns it (leader versus participant).
- If it is the leader's problem, take action to correct the situation to meet group needs.
- If it is the participant's problem, be respectful. Focus on the ground rules. Focus on the tasks and the time. Say, "We must move along to finish on time. Can we discuss this after the session?"

Appendix G: Sample Poster or E-Mail Message

Everyone Welcome!
Bring a friend!

Self-Advocacy For Everyone (SAFE)!

A resource developed by:  MANITOBA INSTITUTE
FOR PATIENT SAFETY

Free Patient Safety Session!

- Do you know your rights as a patient in Manitoba?
- Do you know what a patient advocate is and what one can do for you?
- Do you know how to find on-line patient safety resources?

Learn how to be involved actively in your healthcare decisions. Topics include:

- How to access your medical records
- How to talk with your doctor
- How to work with your pharmacist

When: _____

Time: _____ (60-90 minutes with refreshments)

Location: _____

Registration limited to 15 people.

To register, please call _____ at _____.

Presented courtesy of: _____

<p>Everyone Welcome! <i>Bring a friend!</i></p>	<p>Everyone Welcome! <i>Bring a friend!</i></p>	<p>Everyone Welcome! <i>Bring a friend!</i></p>
<p>Self-Advocacy For Everyone SAFE Toolkit</p> <p>A resource developed by  MANITOBA INSTITUTE FOR PATIENT SAFETY</p> <p>Free Patient Safety Session!</p>	<p>Self-Advocacy For Everyone SAFE Toolkit</p> <p>A resource developed by  MANITOBA INSTITUTE FOR PATIENT SAFETY</p> <p>Free Patient Safety Session!</p>	<p>Self-Advocacy For Everyone SAFE Toolkit</p> <p>A resource developed by  MANITOBA INSTITUTE FOR PATIENT SAFETY</p> <p>Free Patient Safety Session!</p>
<p>Date:</p> <p>Time:</p>	<p>Date:</p> <p>Time:</p>	<p>Date:</p> <p>Time:</p>
<p>Location:</p>	<p>Location:</p>	<p>Location:</p>
<p>To register call</p> <p>_____</p> <p>at _____</p>	<p>To register call</p> <p>_____</p> <p>at _____</p>	<p>To register call</p> <p>_____</p> <p>at _____</p>