

A pilot in a white uniform with a black and yellow striped collar is holding a clipboard with a checklist. The cockpit background is filled with various instruments, dials, and digital displays. A large, dark, teardrop-shaped graphic with a pink outline is overlaid on the right side of the image, containing the title text.

What the Community Sector can learn from Aviation Checklists

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Peel Senior Link

Agenda



Peel Senior Link



The Issue



Diagnostic Journey



Aviation and Community Health – What's the link?



Results



Conclusion

Peel Senior Link

Our Impact (2017-2018)



Total Clients Served
325



New Clients Served
103



**Long-Term Care
Diversions**
36



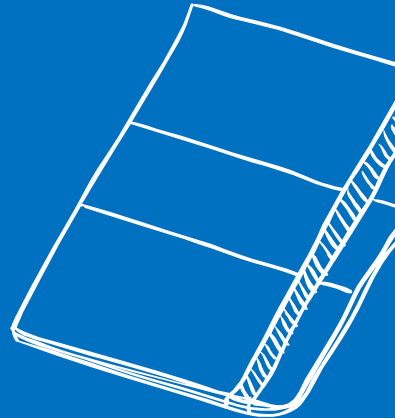
ER Visits Diverted
103



**Dollars Saved With
Diverting ER Visits**
\$40,929*



**Total Resident Days
Per year**
117,530



The Issue

The Issue

Low consistency of service delivery



Identification of Issue



Client Satisfaction Surveys

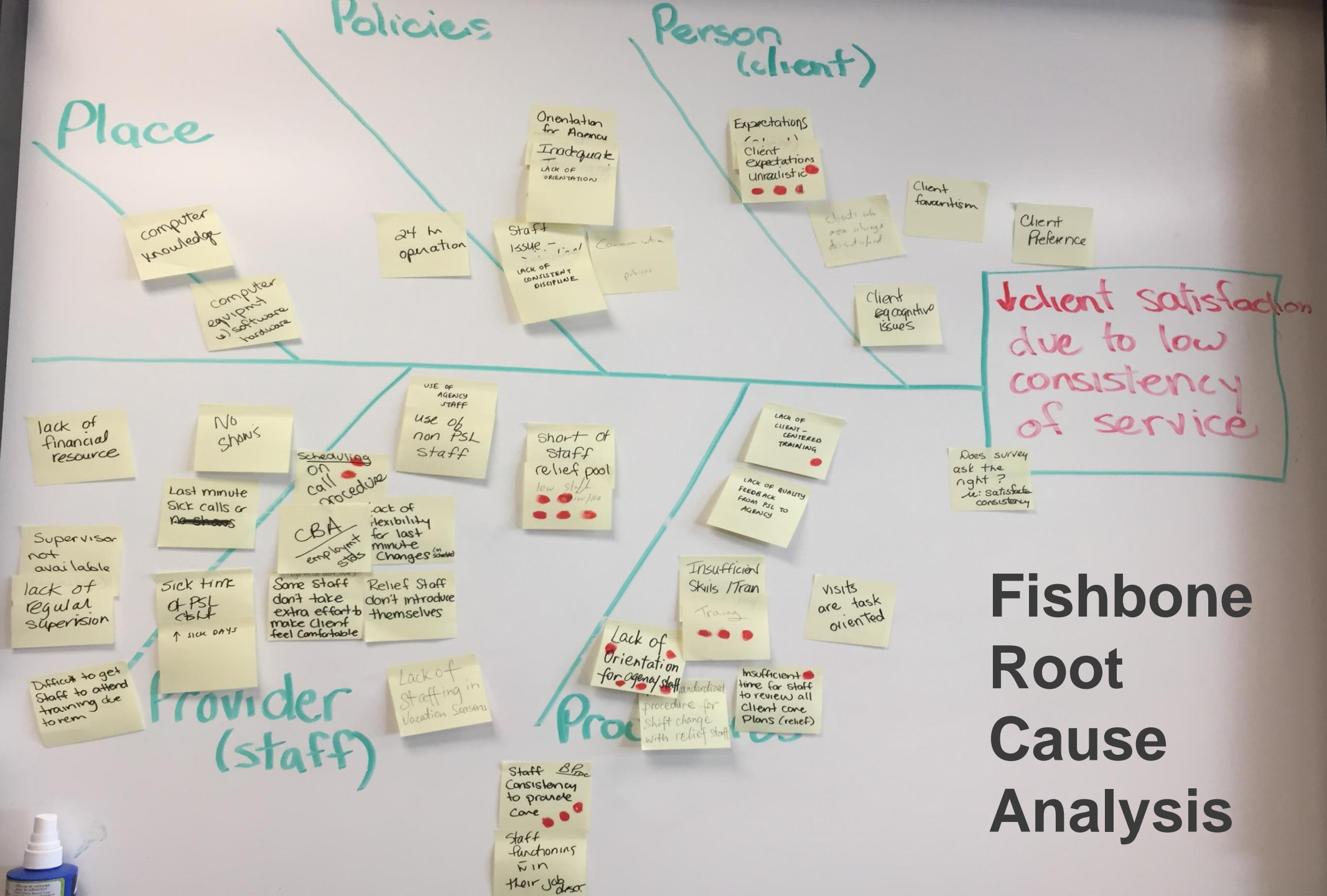


Community Engagement Event



**Family Caregiver & Client
Advisory Panel**

Diagnostic Journey



Fishbone Root Cause Analysis

Driver Diagram

Driver Diagram



AIM

Start with a clearly defined measurable goal



BRAINSTORM

- Generate change ideas
- Cluster ideas for common drivers
- Each driver with clear definitions and measurements



LINKS

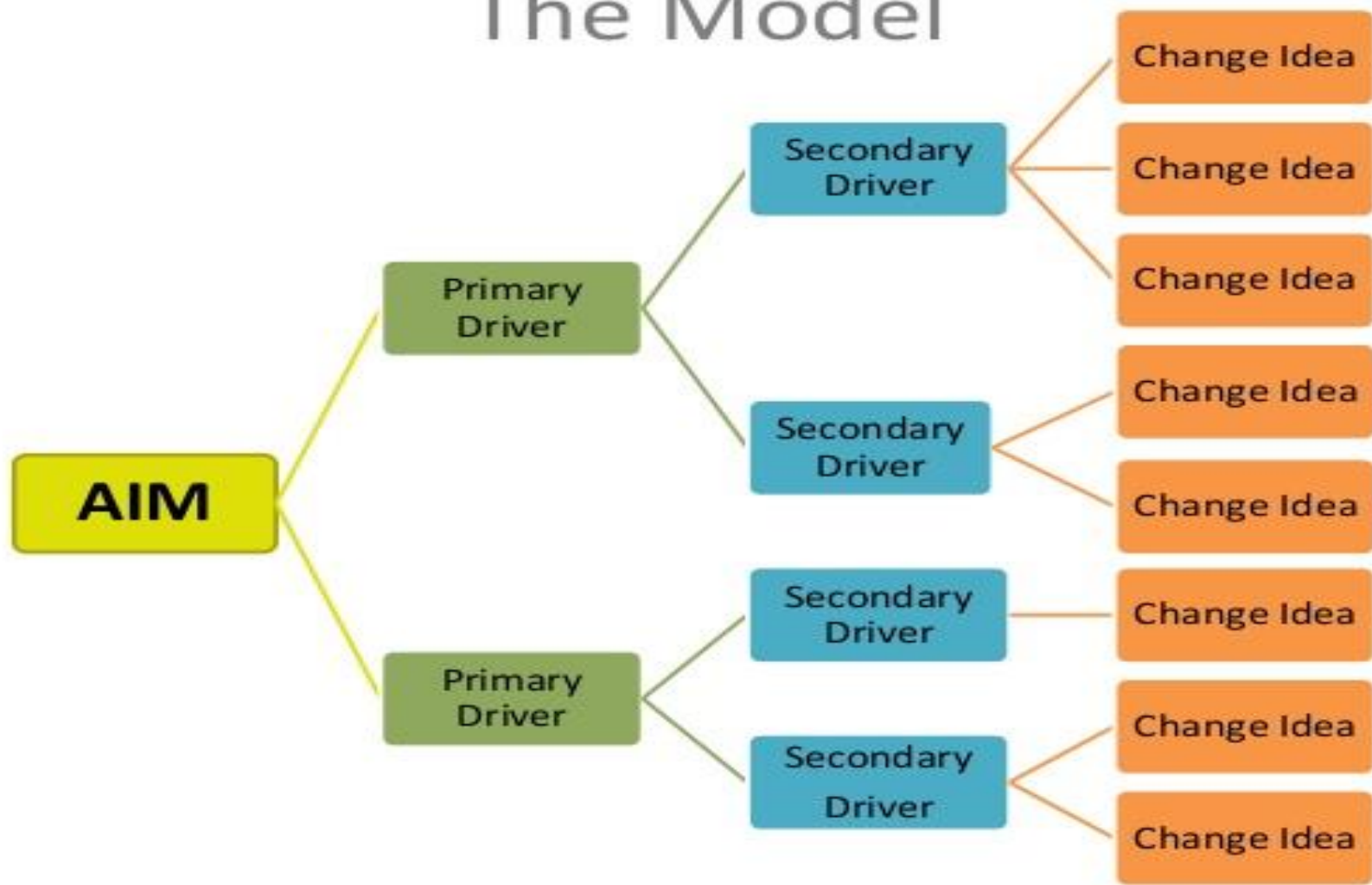
Create primary, secondary and tertiary drivers

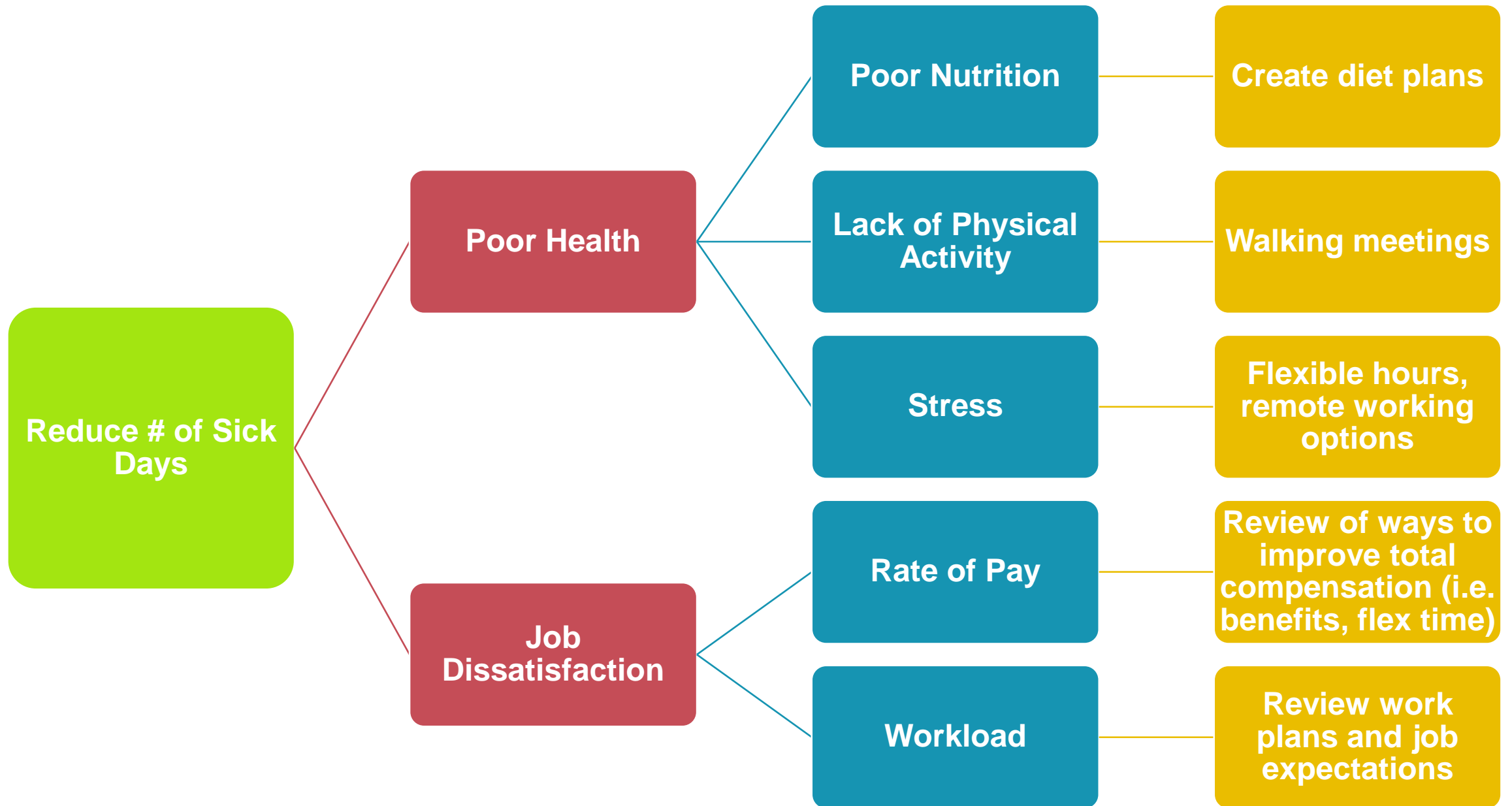


ACTIONS

Add the solutions for each driver

The Model





CASE STUDY ACTIVITY

Case Study #1

Peel Senior Link, a not for profit organization providing personal support worker and home helper services to seniors living independently in the community, had identified an opportunity to improve consistency of care to their clients.

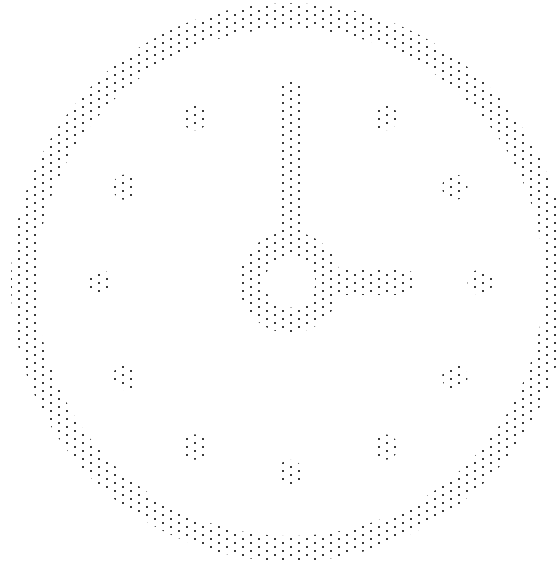
The problem that was identified was that when PSL or Agency relief staff filled in for regular staff that were away, clients felt that they didn't receive the same care, and that the replacement staff didn't know their routine or what they required. It was decided that a working group would be formed to discuss the issue and to go on a diagnostic journey to determine a change idea that could be implemented across the organization. When the working group met, they used the a fishbone diagram to determine the top reasons why services were not consistent. Some of the top issues that were identified were:

client expectations

shortage of staff/staff availability

lack of training

Using the information above, and the template provided, work in groups to fill in the driver diagram to identify your own change idea.

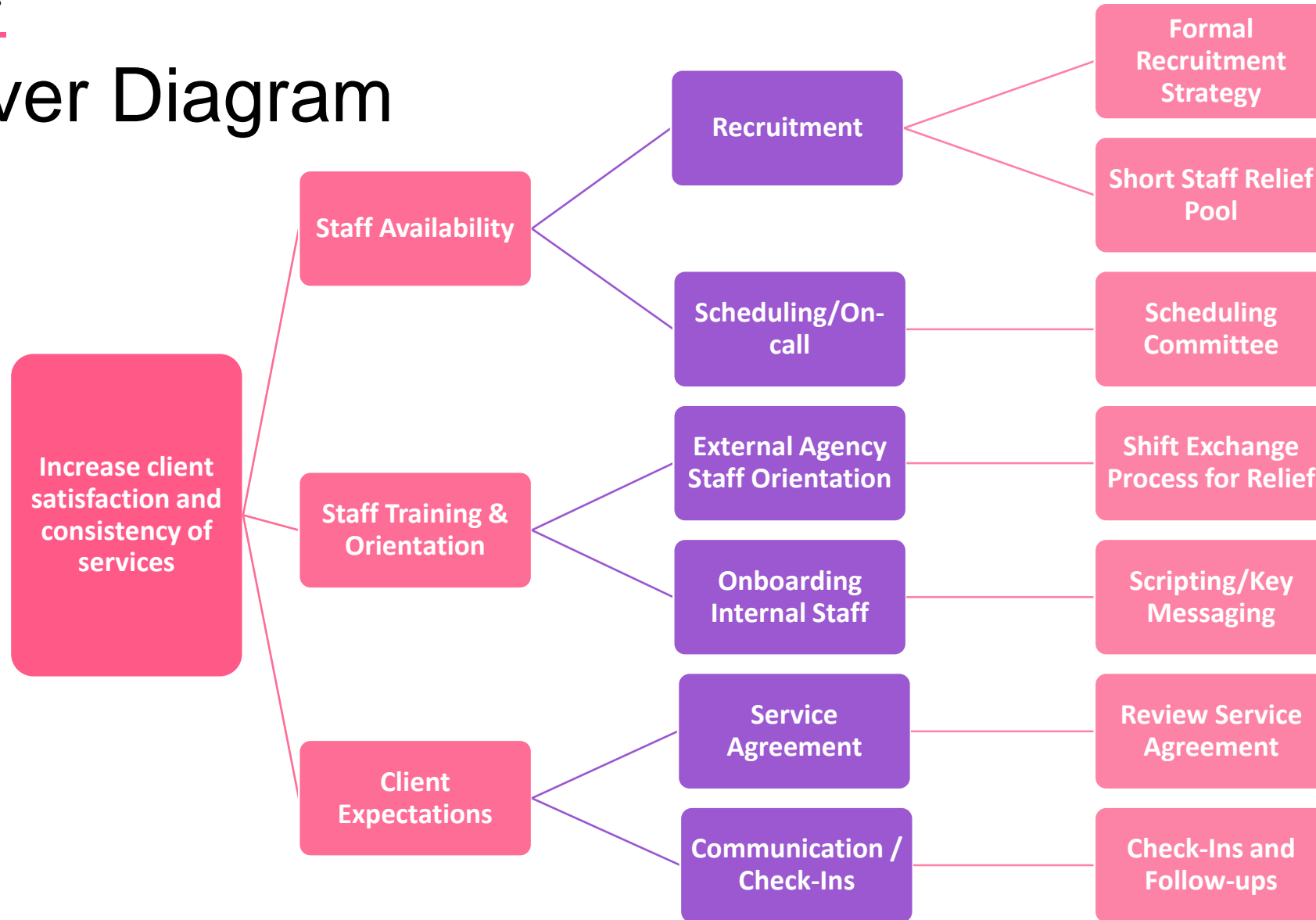


BREAKOUT & DISCUSSION

10 minutes

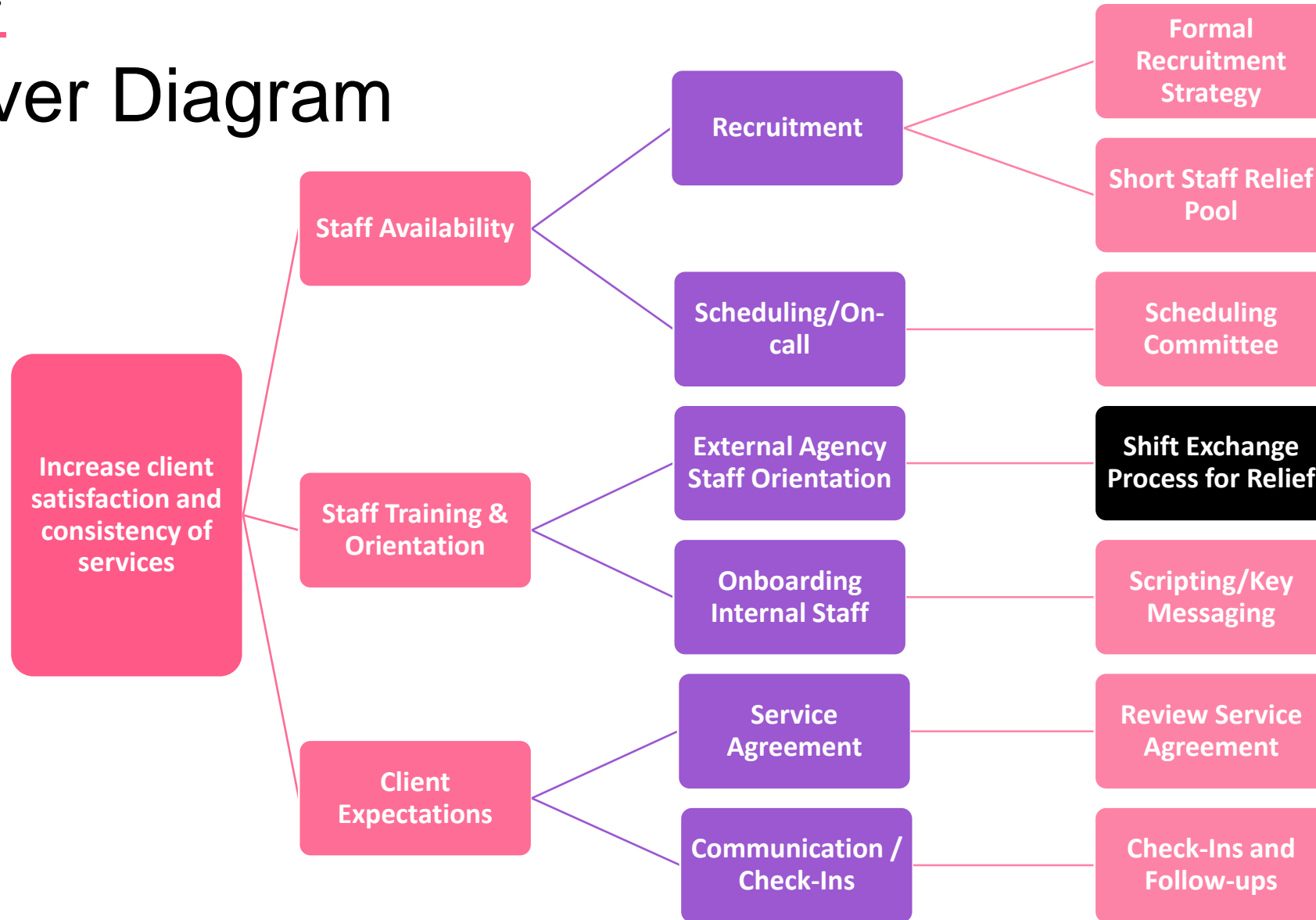
QI Tools

Driver Diagram



QI Tools

Driver Diagram





OUR THEORY

“If we improve or develop a standardized shift exchange process, we will be able to improve the consistency of care our clients receive regardless of who provides the service.”

SMALL DOT (PROJECT) AIM

“By August 10th, 2018, 90% of clients completing our project survey report that they are satisfied or very satisfied with the care and consistency of service they receive.”

BIG DOT (SYSTEM) AIM

“By March 31st, 2019, 90% of clients completing our Client Satisfaction Survey report that they are satisfied or very satisfied with the care and consistency of service they receive.”

Checklists

History of Checklists



Boeing

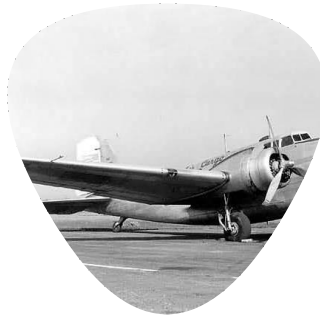
Model 299

Superior

Faster

Fly farther

Carry more payload



Douglas Aircraft

DB - 1



Glenn L. Martin

Martin 146

Boeing
disqualified
due to crash



First checklist was born!

FOCUS ON THE WHY?

STARTING ENGINES

1. Fire Guard and Call Clear—LEFT Right
2. Master Switch—ON
3. Battery switches and inverters—ON & CHECKED
4. Parking Brakes—Hydraulic Check—On-CHECKED
5. Booster Pumps—Pressure—ON & CHECKED
6. Carburetor Filters—Open
7. Fuel Quantity—Gallons per tank
8. Engines: both magnetos on 1 revolution

1. Brakes—Locked
2. Trim Tabs—SET
3. Exercise Turbos and Props
4. Check Generators—CHECKED & OFF
5. Run up Engines

BEFORE TAKEOFF

1. Tailwheel—Locked
2. Gyro—Set
3. Generators—ON

AFTER TAKEOFF

1. Wheel—PILOT'S SIGNAL
2. Power Reduction
3. Cowl Flaps
4. Wheel Check—OK right—OK LEFT

BEFORE LANDING

1. Radio Call, Altimeter—SET
2. Crew Positions—OK
3. Autopilot—OFF
4. Booster Pumps—On
5. Mixture Controls—AUTO-RICH
6. Intercooler—Set
7. Carburetor Filters—Open
8. Wing De-icers—Off
9. Landing Gear
 - a. Visual—Down Right—DOWN LEFT
Tailwheel Down, Antenna in, Ball Turret Checked
 - b. Light—OK
 - c. Switch Off—Neutral
10. Hydraulic Pressure—OK Valve closed
11. RPM 2100—Set

Current use



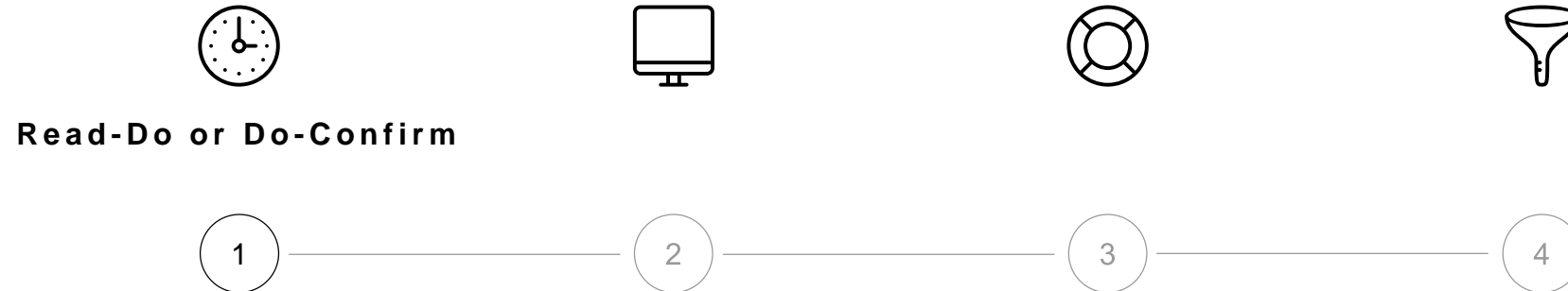
Aviation Gold Standard



**Rail Transport
Medicine
Mining
Nuclear Power**



Checklist Best-Practices



Read-Do: staff carry tasks and check-off as they complete them

Do-Confirm: uses memory and experience. After completion, confirm if checklist is followed

Checklist Best-Practices



Put in all the steps that are required to carry out the tasks intended

Focus only on critical steps

Checklist Best-Practices



Read-Do or Do-Confirm



Determine Steps



Clear and Concise



1

2

3

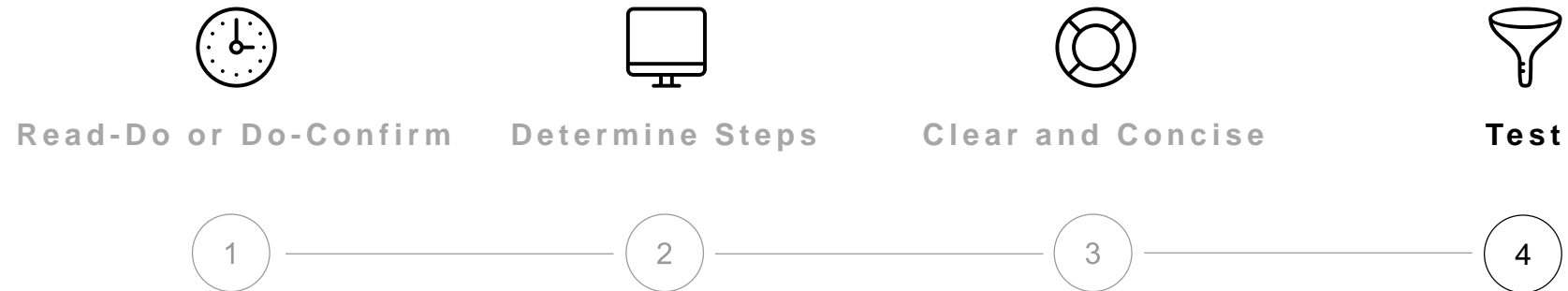
4

Avoid unnecessary colours

Avoid jargon

Follow a predictable order

Checklist Best-Practices



Let the team using it have a say in it

Customize based on feedback

Complete multiple PDSA cycles

CHECKLIST ACTIVITY

CHECKLIST ACTIVITY

You are a caregiver of an elderly parent and are hiring a PSW to provide care for the very first time (half-day).

You have a full-time job and you are concerned that your parent will not get the consistency of care as he/she will be served by different PSW's on a daily basis.

Create a checklist that outlines the critical steps involved in your parent's care.



BREAKOUT & DISCUSSION

10 minutes

SHIFT EXCHANGE CHECKLIST

All staff, including relief staff from Peel Senior Link or an external agency, are expected to follow each step listed below during Shift Exchanges.

Arrive at Site	Information Exchange	Prepare to leave for Client's Home
<ul style="list-style-type: none"> <input type="checkbox"/> Greetings/ Introduce yourself 😊 <ul style="list-style-type: none"> <input type="checkbox"/> Name <input type="checkbox"/> Site/agency <input type="checkbox"/> Shift & team you are covering <input type="checkbox"/> Identify outgoing staff to exchange with <input type="checkbox"/> Sign-In to General Communications Binder <input type="checkbox"/> For non-PSL staff: take a relief PSW name badge <input type="checkbox"/> Ensure outgoing staff returns the following paperwork: <ul style="list-style-type: none"> <input type="checkbox"/> Daily Shift Duties (Shred at each Shift Exchange) <input type="checkbox"/> Shift Exchange Report (Shred once daily at Morning Shift Exchange) 	<ul style="list-style-type: none"> <input type="checkbox"/> Outgoing staff prepare paperwork for incoming staff <input type="checkbox"/> Review all clients in Shift Exchange Report <input type="checkbox"/> Outgoing staff to explain in details Daily Shift Duties & read Client Care Plan for Shower Routine <input type="checkbox"/> Check whiteboard for important messages <input type="checkbox"/> Forms to fill out: <ul style="list-style-type: none"> <input type="checkbox"/> Safety Incident Report (explain how to fill out) <input type="checkbox"/> Time Slip <input type="checkbox"/> Travel Reimbursement <input type="checkbox"/> Check Blister Packs <ul style="list-style-type: none"> <input type="checkbox"/> Check MAR Sheet (including the back of MAR for PRN administration) <input type="checkbox"/> Put Meds/Narcotics in Team Bag <input type="checkbox"/> Count Narcotics <ul style="list-style-type: none"> <input type="checkbox"/> Complete Narcotics Count Sheet <input type="checkbox"/> Lock Narcotics Box 	<ul style="list-style-type: none"> <input type="checkbox"/> Ensure you have the following: <ul style="list-style-type: none"> <input type="checkbox"/> Shift Exchange Report <input type="checkbox"/> Daily Shift Duties <input type="checkbox"/> Shower Schedule <input type="checkbox"/> Name Badge <input type="checkbox"/> Team Bag with: <ul style="list-style-type: none"> <input type="checkbox"/> Meds/Narcotics <input type="checkbox"/> Team Key Chain (make sure all keys and labels are intact) <input type="checkbox"/> Team Cell Phone (make sure phone is charge and working) <input type="checkbox"/> First Aid <input type="checkbox"/> EMS transfer sheet for each client <input type="checkbox"/> Roadmap <input type="checkbox"/> Masks <input type="checkbox"/> Gloves <input type="checkbox"/> Flashlight <input type="checkbox"/> Sanitize team cell phone & key chain <input type="checkbox"/> Lock filing cabinet <input type="checkbox"/> Ask questions! <ul style="list-style-type: none"> <input type="checkbox"/> Call co-worker on other team for questions , if co-worker not available call on-call (numbers in the team phone) <input type="checkbox"/> Client Preferences? <input type="checkbox"/> Don't forget to introduce yourself to each client

WHERE TO FIND DOCUMENTS/MEDS

General Communication Binder	<ul style="list-style-type: none"> • Purpose: General communication messages (e.g. medication status & orders, head office memos, supervisor updates etc.) • Location: Filing Cabinet Binder Colour: Lime Green
Shift Exchange Report/Daily shift duties/Shower Schedule	<ul style="list-style-type: none"> • Purpose: To make important notes during their shift and to assist in passing information to incoming staff/Reference to guide client duties during each shift and client preferences • Location: Daily Shift Duty Binder Binder Colour: Yellow
Narcotics Count Sheet	<ul style="list-style-type: none"> • Purpose: To accurately count, record and monitor narcotics • Location: Narcotics Lock Box (in Filing Cabinet)
Narcotics Lock Box	<ul style="list-style-type: none"> • Purpose: Safely store narcotics • Location: Filing Cabinet (locked)
MAR Sheet	<ul style="list-style-type: none"> • Purpose: Document the activity of medication administration • Location: Filing Cabinet (Individual med bags)
Safety Incident Report	<ul style="list-style-type: none"> • Purpose: To document any near misses or incidents for both staff and clients that happened or reported during the shift • Location: Filing Cabinet
Whiteboard	<ul style="list-style-type: none"> • Purpose: Quick notes, important messages, client in/out, hospital visits, etc. • Location: On the wall
Name Badge	<ul style="list-style-type: none"> • Purpose: Form of identification to recognize relief PSL/Agency staff, also for clients to feel comfortable • Location: Hanging on bulletin board

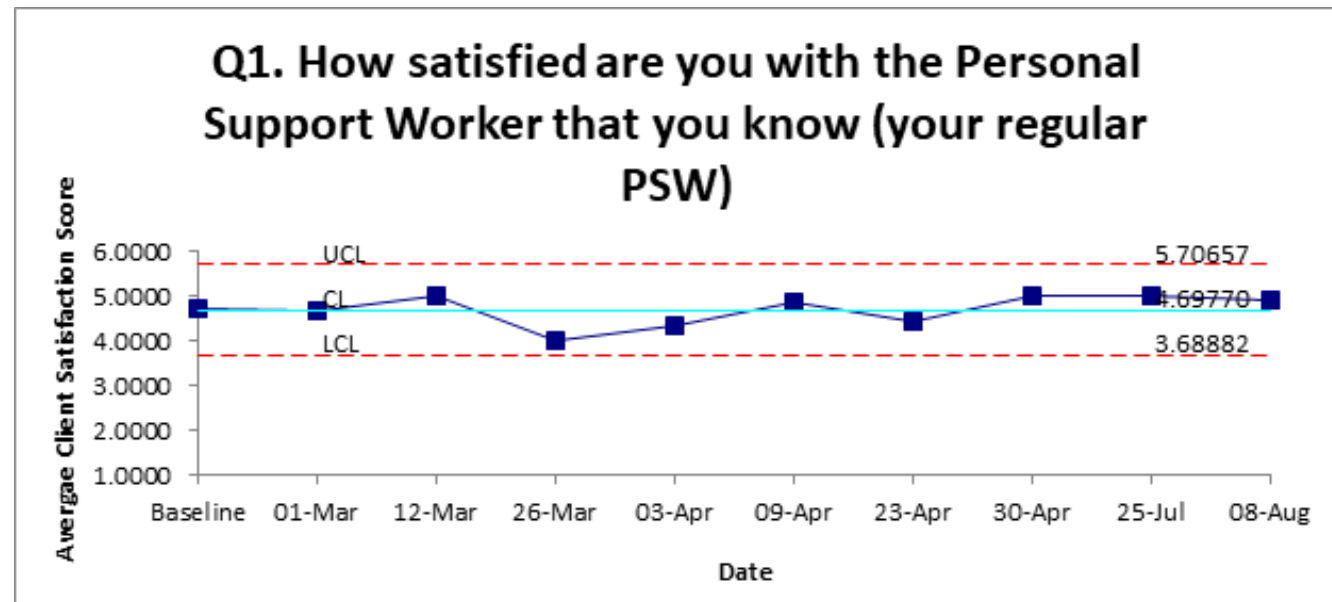
Results

Satisfaction Scores

Minimal changes in regards to client satisfaction related to regular staff they are familiar with

Baseline: 4.7

Post-Change: 4.9



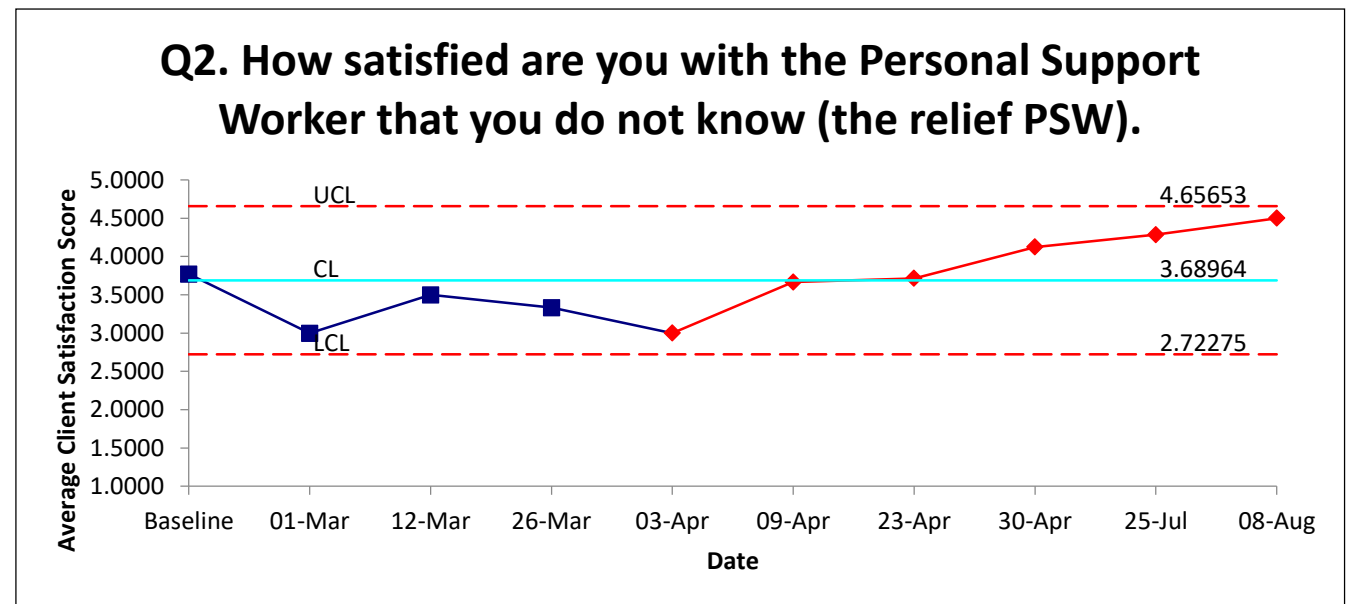
Very Satisfied	Satisfied	Neither Satisfied/ Dissatisfied	Dissatisfied	Very Dissatisfied
5	4	3	2	1

Satisfaction Scores

Increasing trend in data; clients are becoming more satisfied with relief staff

Baseline: 3.7

Post-Change: 4.5



Very Satisfied	Satisfied	Neither Satisfied/ Dissatisfied	Dissatisfied	Very Dissatisfied
5	4	3	2	1

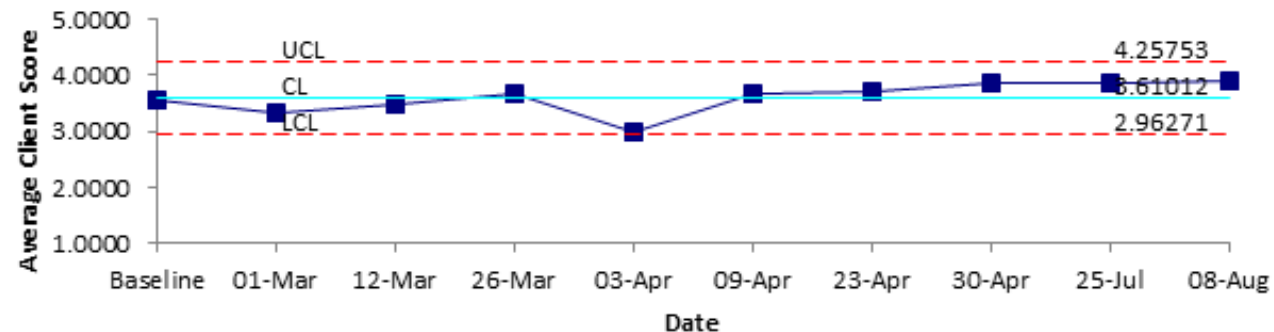
Satisfaction Scores

Steady increase in client reports of staff introducing themselves appropriately

Baseline: 3.5


Post-Change: 3.9 (97.5%)

Q3. If you do not know the Personal Support Worker, how often do they introduce themselves to you (e.g. say their name)?




Always	Sometimes	Rarely	Never
4	3	2	1

How do staff
feel about this
change?

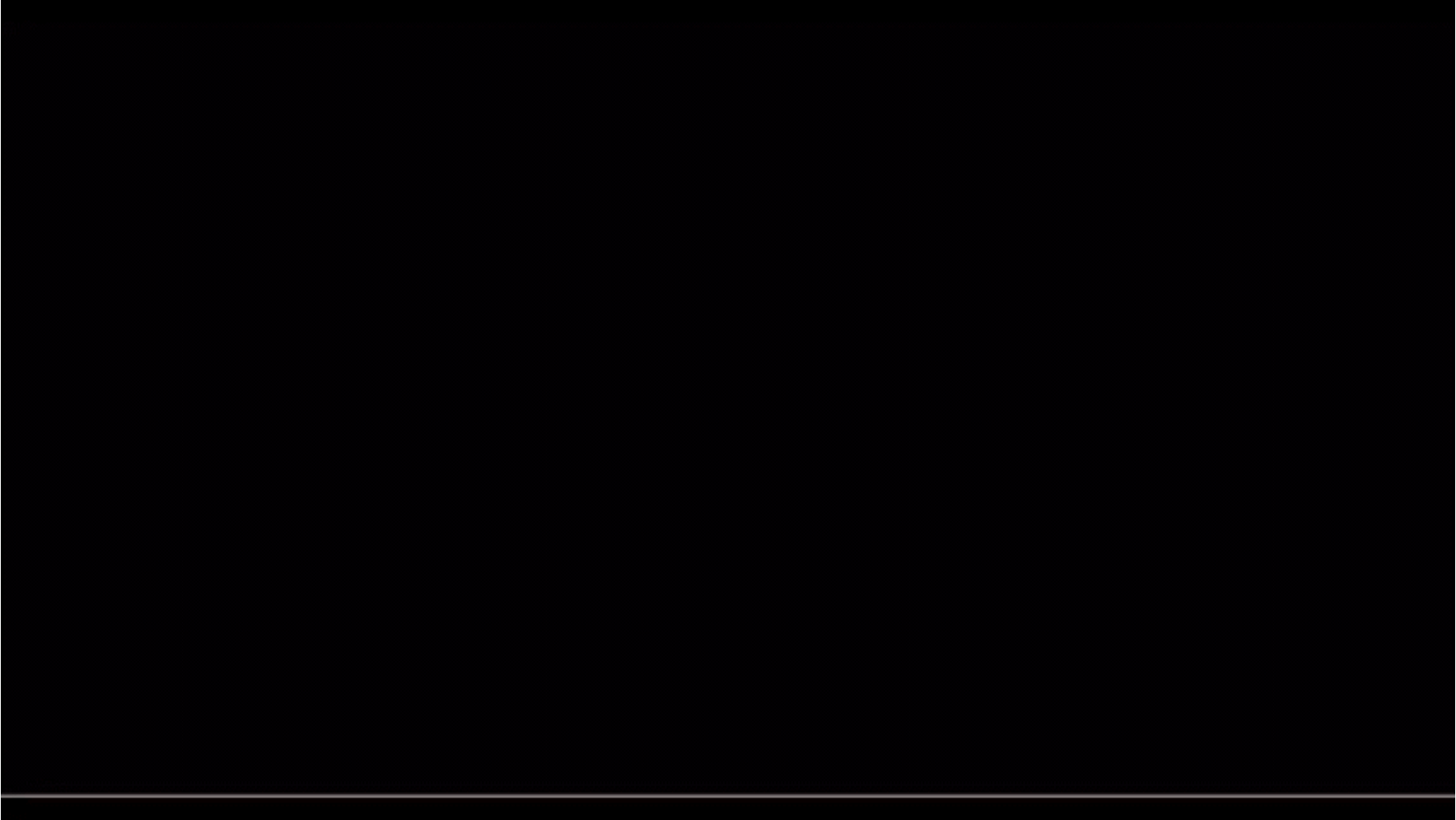


82% of staff
agree or strongly agree
that the change will **help**
incoming staff provide
more consistent care

How do staff
feel about this
change?



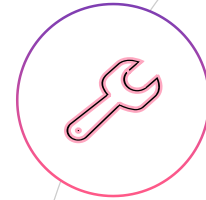
80% of staff
agree or strongly agree
that the change will **help**
themselves provide more
consistent care



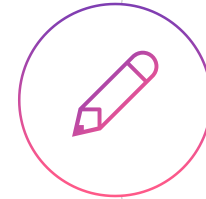
CONCLUSION

Three important values

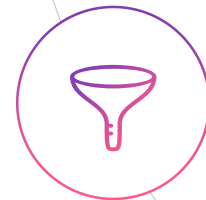
CRITICAL COMPONENT OF
HUMAN FACTORS



IMPACT OF CHECKLIST



SIMPLE SOLUTIONS



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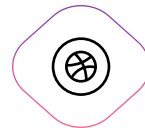
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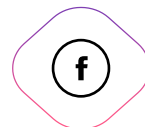
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Peel Senior Link

Thank you



ACCREDITATION
CANADA



Peel Senior Link
helping seniors live independently



References

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03

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04

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