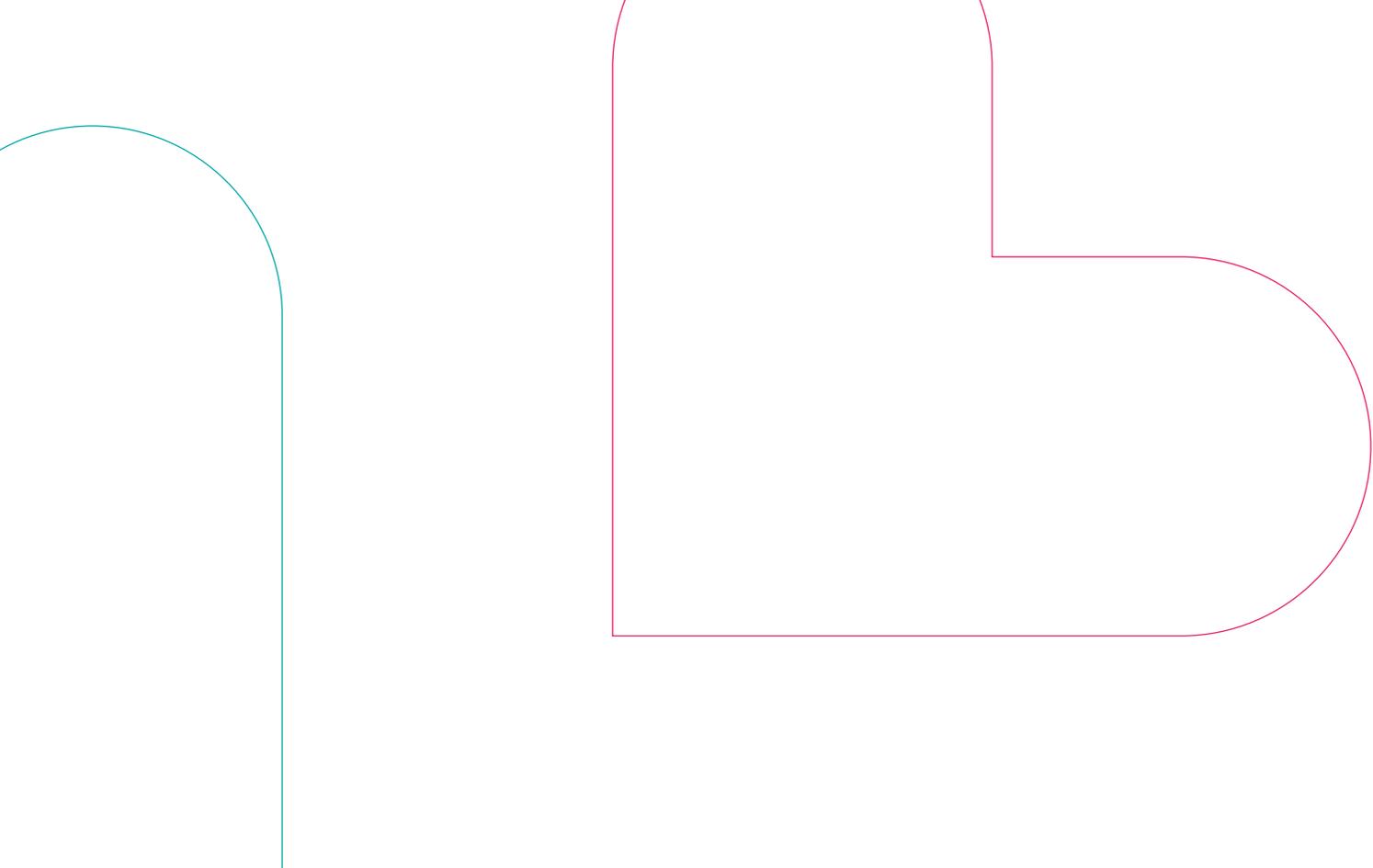




**Essential Together:**

**A Change Package to Support  
the Implementation of the  
Essential Care Partner Pledge**

November 2021



## About Healthcare Excellence Canada

Healthcare Excellence Canada (HEC) is an organization with a relentless focus on improving healthcare, with – and for – everyone in Canada. Launched in March 2021 from the amalgamation of the Canadian Patient Safety Institute and the Canadian Foundation for Healthcare Improvement, Healthcare Excellence Canada has greater capacity to support partners to turn proven innovations into widespread and lasting improvement in patient safety and all the dimensions of healthcare excellence. We believe in the power of people and evidence and know that by connecting them, we can achieve the best healthcare in the world.

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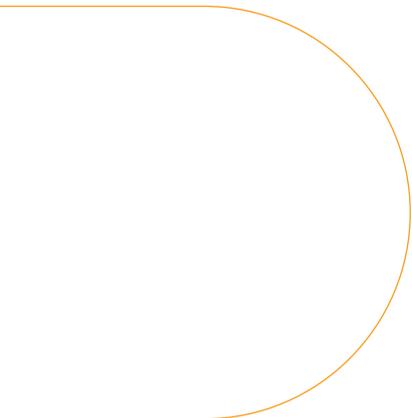
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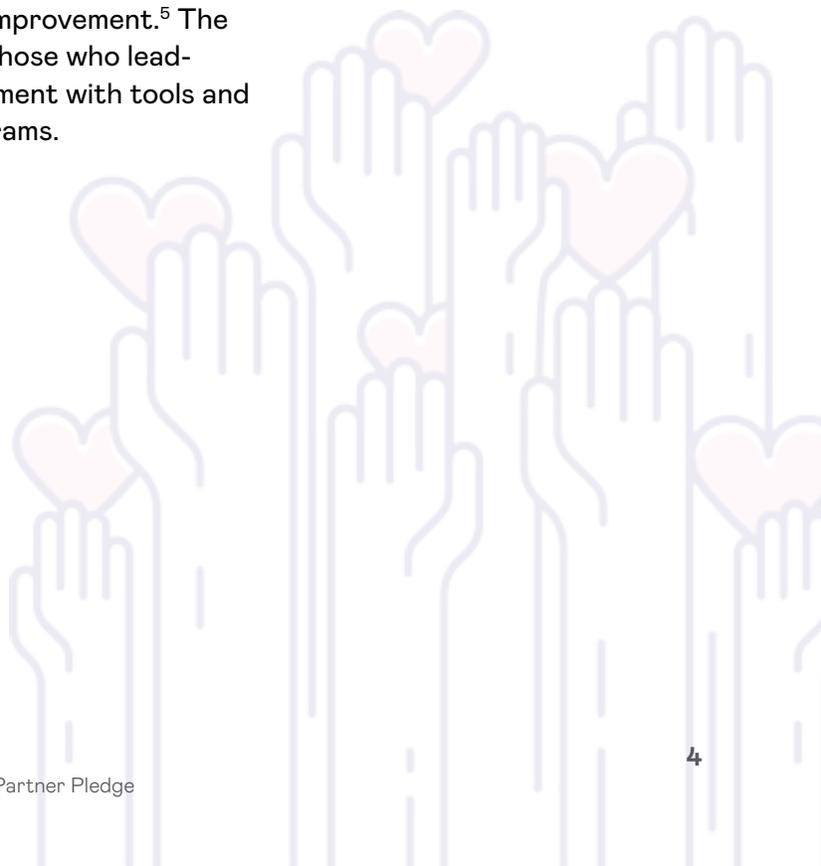
# Introduction

The importance of essential care partners has never been more evident. With the implementation of restrictive caregiver presence policies, particularly in the early days of the pandemic, numerous unintended harms affecting patient<sup>1</sup> safety, experience and outcomes, as well as the negative impacts on caregivers and healthcare providers, have been documented. It has become increasingly clear that essential care partners (e.g. family members, close friends or other caregivers as designated by the patient) are integral for compassionate and equitable care that preserves the dignity, safety and well-being of patients,<sup>1</sup> clients, those living in long-term or congregate care settings, as well as staff.

NOW is the time to review essential care partner policies and take action to support their presence in health and care settings, whether in times of crisis or not. In an effort to focus and align these efforts, [Essential Together](#) has developed a [pledge](#) so partners can express their commitment to taking action and encourage others to do the same.

This **Change Package** is a guide for developing a plan that moves you to act on your commitment to the Essential Together Pledge. It sets the stage for meaningful engagement with patients, caregivers and staff developing person- and family-centred policies and practices by promoting the benefits of essential care partners across your organization.

This guide is based on [current evidence and policy guidance](#) related to caregiver presence policies and aims to create an organizational culture that welcomes and recognizes families and other caregivers as partners in care. This resource focuses on key steps on the journey to implement meaningful organizational change informed by leading theories for patient engagement<sup>2</sup>, leading change<sup>3,4</sup>, and quality improvement.<sup>5</sup> The goal is to link those who implement policy, including those who lead person- and family-centred care and patient engagement with tools and resources that support essential care partner programs.



# About Essential Together

Through Essential Together, Healthcare Excellence Canada is working with health and care organizations to support them to safely re-integrate, welcome and engage essential care partners as part of care teams, during COVID-19 and beyond. In 2020, we launched Essential Together in response to the rapid changes made to caregiver presence policies in the early days of the pandemic, as a program to support policy-makers, policy implementers and those who experience the impacts of caregiver policies through subsequent waves, and to develop resilient policies and practices into the future. The goal of Essential Together is to ensure caregiver presence is an embedded and common person- and family-centred practice, and not the exception.

The Essential Together program is open access where you can:

- Access [Essential Together Learning Bundles](#) with tools and resources that can be adapted to implement policy guidance
- Join [Essential Together Huddles](#) that create an open and safe space to support learning from, and connecting with, peers who are facing similar challenges
- Link into the latest [evidence](#) and environmental [policy scans](#) for what's happening across Canada

We're calling on health and care organizations across the country to join Essential Together and implement evidence-informed policies and programs to ensure that the role of essential care partners is recognized and valued, and their involvement as active partners is an embedded person- and family-centred practice at all times, whether in times of crisis or not.



# About the Essential Care Partner Pledge

Commit to welcoming essential care partners into your organization now and into the future.

[Take the Essential Together Pledge](#) to show your organization recognizes and values the role of Essential Care Partners, and is committed to working together with those who are receiving care, caregivers and staff to develop and implement policies that support patient and caregiver partnership in care.

## The Essential Together Pledge:

We value the role of Essential Care Partners and recognize how this role is different from a visitor. As a result, we are committed to working together with those who are receiving care, caregivers and staff to take the following actions:

- We will engage with those who are receiving care, caregivers and staff to review existing visitor and caregiver presence policies and practices.
- We will work in collaboration with those who are receiving care, caregivers and staff to develop and implement person-centred policies, practices and programs that enable the presence of essential care partners at all times, ensuring compassion, equity, dignity, safety and well-being for all.
- We will be transparent with our caregiver presence policies and practices and ensure clear and consistent communication.
- We will promote the role and benefits of essential care partners across our organization and the health system.

This Change Package builds on implementation tools developed to support the Better Together<sup>6</sup> and Essential Together programs. It is intended to help partners focus their efforts on embedding caregiver presence in their organizations, and access the tools and resources created to facilitate this process.

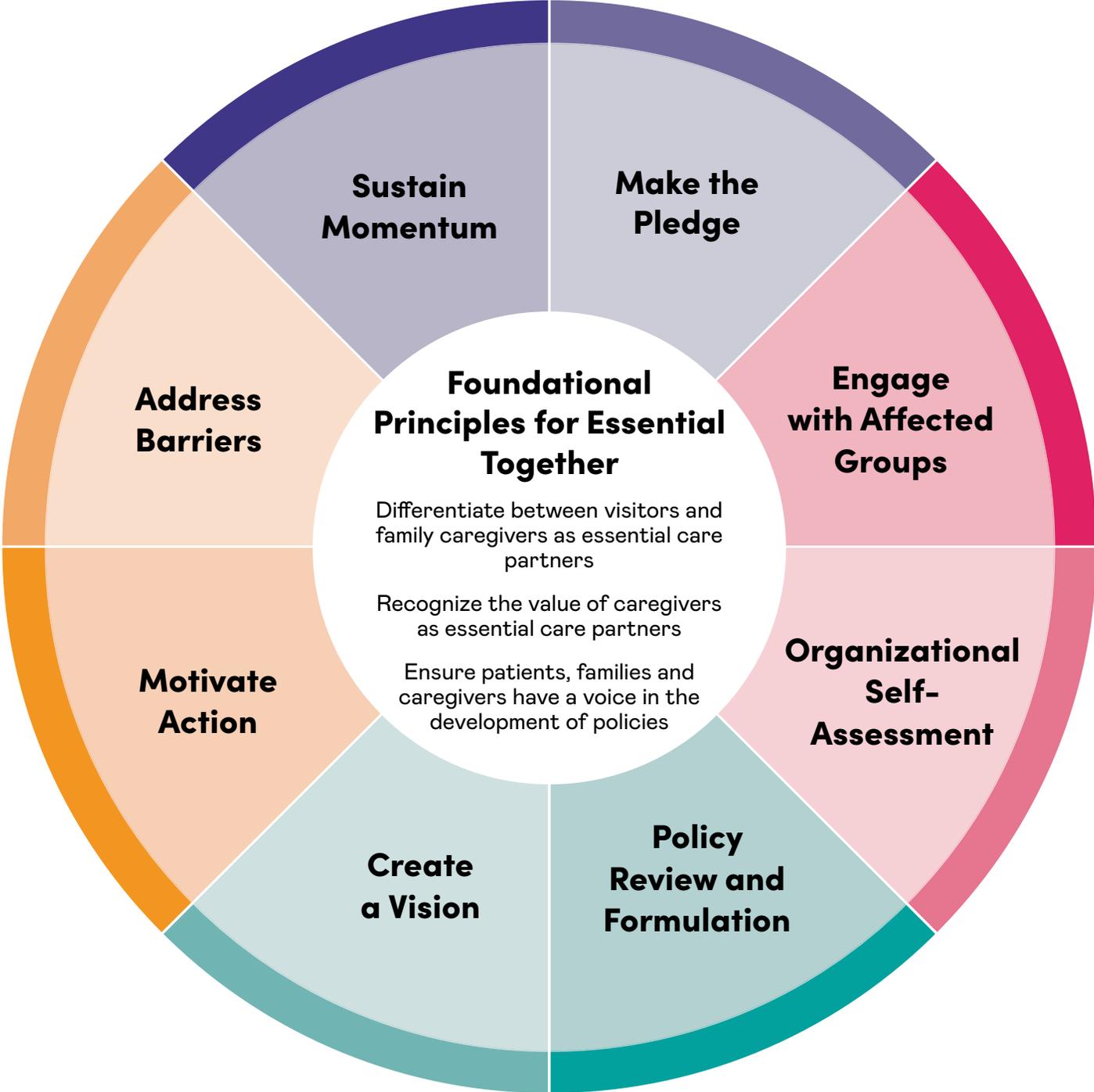
## Benefits of Pledging

In addition to access to the Essential Together resources and peer-to-peer learning opportunities, organizations that take the Essential Care Partner Pledge will:

- Be recognized as an organizational 'Essential Care Partner Champion' that values the role of essential care partners
- Be publicly acknowledged on the HEC website and other materials as an 'Essential Care Partner Champion' that supports person- and family-centred practices
- Act as a peer mentor to other organizations committed to person- and family-centred practices
- Have access to coaching support as they take action on their commitment to Essential Care Partners

# Creating the Conditions for Change: A Guide for Implementation

Using a well-known change theory,<sup>7,8</sup> we outline key steps for creating an organizational culture that welcomes essential care partners through evidence-informed policies and programs.



## Make the Pledge

You demonstrate your commitment as an ‘Essential Care Partner Champion’ when you make the pledge that welcomes and recognizes the valuable role of essential care partners in your organization. By making the pledge, you have access to all that the [Essential Together](#) program offers, including access to learning bundles, curated tools and resources, networking and peer-to-peer interaction, pan-Canadian learning opportunities, and coaching for you and your team. Commit to person- and family centred care and partnership with patients and caregivers knowing that not only is it the right thing to do, but that it is grounded in [evidence](#) that demonstrates the benefits of essential care partners.

## Engage with Affected Groups

Ensuring the voices of those who are most affected by essential care partner policies and programs are heard is the foundation to this commitment. These groups include patients and caregivers, healthcare providers and staff, and organizational leaders. Engaging individuals from these groups to work collaboratively as a diverse team brings in a wide range of perspectives and innovative ideas by committed change agents across the organization.<sup>9</sup> These key stakeholders should be actively involved throughout the design, development and implementation of practices and programs that support caregiver presence.

### Key Resources

[Essential Together Learning Bundle: Mutual Expectations](#)

[Patient Engagement Toolbox \(University of Toronto\)](#)

## Organizational Self-Assessment

An organizational self-assessment of current policies and practices helps determine initial priorities and actions.<sup>10</sup> Examining current visitor and caregiver policies and practices will give you an important starting point. Understand what is needed from the perspective of those most affected by these policies. Collect broad perspectives through interviews, site tours and surveys. This will situate policy development in the context of ongoing initiatives that support person- and family-centred care in your organization. The outcomes of the assessment are an important tool for gaining buy-in and identifying specific challenges that might be helped through the presence of essential care partners.

### Key Resources

[Essential Together Tool](#)

[Better Together Toolkit](#) (Institute for Patient- and Family-Centered Care)

## Policy Review and Formulation

In this phase, the team will design or adapt guidelines and written policies related to the presence of essential care partners in their facilities. Consideration should be given to a variety of circumstances that could be impacted by caregiver presence. In addition, these policies should reflect the latest evidence-informed guidance, and should be developed through a broad consultation process and in partnership with those most affected by policy (as noted above).

The Essential Together program is based on evidence-informed co-developed policy guidance, and was developed together with those that make policy, implement policy and are impacted by policy. This policy guidance may be useful to you as you review and develop/revise policies for your organization. Three foundational principles have been identified for developing caregiver presence policies.

[Click here](#) to view Overview of the Foundational Principles video.

### Foundational Principles for Essential Together

- Differentiate between visitors and family caregivers as essential care partners
- Recognize the value of caregivers as essential care partners
- Ensure patients, families and caregivers have a voice in the development of policies related to visitors and essential care partners

The policy guidance is based on a journey map for the safe reintegration of essential care partners that divides the process into three main phases:

- Identification of caregivers as essential care partners
- Entry into the facility
- Caregiving

The policy guidance focuses on the first two phases and includes key steps for creating a positive caregiver experience.

### Key Resource

- [Policy Guidance for the Reintegration of Caregivers as Essential Care Partners](#)

## Create a Vision

A clear understanding of how the reintegration of essential care partners will benefit patients and staff, and the health system will motivate people throughout the organization to adopt changes and help remove barriers to success. Engage both the heart and the head by presenting evidence and linking to patient and caregiver experience can effectively connect with a broad audience.<sup>11</sup> This vision should be relevant and realistic within the context of your organization. It should also articulate the urgent need to reintegrate essential care partners.

### Key Resources

[Evidence Brief: Caregivers as Essential Care Partners](#)

[Bringing Evidence to Life and Busting Myths through Stories](#)

## Motivate Action

The goal is to create an environment where people feel invested in the success of the program so they are more likely to integrate the foundational principles into their normal activities.<sup>12</sup> The process of reviewing, developing and implementing a caregiver policy that is based on meaningful engagement with those most affected can catalyze a cultural shift towards person- and family-centred practice.<sup>13</sup> An implementation strategy should include clear communication, evidence-informed strategies and training for staff and care partners. Collaboration, respect and a clear commitment to essential care partners set the stage for meaningful change. Design and test different improvement ideas using Plan-Do-Study-Act (PDSA) cycles.<sup>14</sup> Ensure that there are opportunities for staff, patients and caregivers to be involved in a process of change that is open, transparent and clearly communicated.<sup>15</sup>

### Key Resources

[Bringing Evidence to Life and Busting Myths through Stories](#)

[Essential Together Learning Bundles](#)

[How to Improve | IHI - Institute for Healthcare Improvement \(PDSA Cycles\)](#)

## Address Barriers

The healthcare system has faced significant challenges over the course of the pandemic where both staff and the system have been overwhelmed. Restrictive visitor policies were introduced early in the pandemic and have loosened over time, particularly as evidence continues to mount demonstrating their detrimental impact on the safety, care, outcomes and experience of patients and their caregivers, as well as staff. The return of essential care partners is an opportunity to mitigate the burdens on staff and improve patient outcomes. There are, however, barriers to implementation of caregiver presence. Planning for how you will promote acceptance will facilitate program success. The Essential Together [Policy Guidance](#) and [Evidence Brief](#) have in-depth guidance for developing policies and programs that will help address challenges and concerns. Some common barriers are noted below:

Barrier	Response
Unclear distinction between visitor and essential care partner.	<ul style="list-style-type: none"> <li>• Ensure that the roles are clearly defined and widely promoted</li> <li>• Provide evidence that supports the essential role of care partners</li> </ul>
Fear of infection and outbreaks (including COVID-19)	<ul style="list-style-type: none"> <li>• Implement screening protocols</li> <li>• Provide access to personal protective equipment, including how to properly don/doff (as required)</li> <li>• Provide infection prevention and control training for ECPs and unit-specific safety protocols</li> <li>• Share local data and the evidence brief which indicates that caregivers have not been significant vectors of transmission</li> </ul>
Inconsistencies in interpretation and application of existing policies.	<ul style="list-style-type: none"> <li>• Develop a comprehensive policy supported by training for staff and caregivers</li> <li>• Ensure clear and consistent communication regarding caregiver presence policies</li> <li>• Implement a rapid appeals process to support consistent and transparent application</li> </ul>
Staff and organizational burnout	<ul style="list-style-type: none"> <li>• Complete the Essential Together assessment tool to inform planning and decision-making</li> <li>• Listen to input from key stakeholders and integrate feedback in policy development</li> <li>• Share evidence brief that demonstrates how ECPs support care when they work together with staff to reduce burden on staff</li> </ul>
Lack of knowledge about evidence supporting essential care partner presence	<ul style="list-style-type: none"> <li>• Share evidence that demonstrates both the benefits of ECPs and also the numerous harms to patients, caregivers and staff that have resulted due to restricted access of ECPs</li> </ul>
Lack of visibility of the ECP role	<ul style="list-style-type: none"> <li>• Provide caregiver IDs, such as lanyards, badges, bracelets</li> </ul>
Capacity for training among staff and ECPs	<ul style="list-style-type: none"> <li>• Implement clear, relevant, accessible and culturally appropriate training in various formats</li> </ul>

## Sustain Momentum

Build on the foundation of well-designed policies and programs by establishing key milestones and communicating successes. Demonstrating the positive impact of these changes will help you to continue to reduce resistance to change and open the door to deeper cultural changes. In particular, sharing experiences of patients, caregivers and staff inspires continued change and improvements in patient care, safety, and outcomes.

Essential Together offers opportunities for ongoing peer learning and access to the latest research into essential care partner presence. Stay connected with a network of healthcare leaders and providers who are committed to ensuring the role of essential care partners is recognized and valued across health and care systems in Canada.

### Key Resource

⋮ [Essential Together Huddles](#)

## Stay Connected with Essential Together

As a participant in the Essential Together program, you will receive regular updates on events, new resources and learning opportunities. If you have any further questions about the program, you can contact the Essential Together team directly at [Essential.Together@hec-esc.ca](mailto:Essential.Together@hec-esc.ca).

# References

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