



THE ROAD AHEAD SUPPORTING SUSTAINABLE CAPACITY BUILDING

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BSO CAPACITY BUILDING

THE RIGHT TOOL AT THE RIGHT TIME

Capacity Building Roadmap helps plan the first 6 months of orientation for new staff. It is a framework to organize what staff need to know, when they need to know it and how they can learn it.

You need to **develop an individual learning plan.**

The Road Ahead helps inform your decisions at any career point, supporting continuous learning for yourself or your staff.

You need to **plan an orientation.**



YOU ARE HERE.

You are likely interested in building capacity for an individual, team or organization to support person-centred care and enable system change for older adults with, or at risk for, responsive behaviours associated with complex mental health, addictions, dementia and other neurological conditions; and their caregivers.

The BSO project offers tools that support core competencies development, workforce learning and development programs, and better care at the bedside.

HOW DO YOU KNOW WHICH TOOL IS RIGHT FOR YOU, RIGHT NOW?

Consider what you need to do, and what you're ready to do. Then follow the statements that reflect where you are at to help you find a start-point. Use this process as many times as you need to continue to build capacity.

You need to **invest in education and training.**

You need to **develop an organizational education strategy.**

You need to **plan a new service.**

You need to **continue with the next phase of training for your recent hire.**

You need a **conceptual framework for team-based care.**

Behavioural Education and Training Supports Inventory (BETSI) helps you define organizational learning needs and will help you spend your training budget by pointing you to the right mix of education and training programs, at the right time.

You need to **understand the current capacity of your organization.**

You need to **develop a skilled care team.**

Person and Practice-based Learning (PerPLe) tool is the framework for a learning and development approach for health care teams. This framework helps you to apply any learning opportunity in a team-based environment.

WHAT

... IS “THE ROAD AHEAD”?

The Road Ahead is a tool created to support capacity building and enable better health, better care and better value across the system for seniors at risk and their families. Designed as a tool to support individuals, teams or organizations in their continued quest for learning related to the 12 BSO Recommended Core Competencies, The Road Ahead details a selection of strategies to support learning. By providing this “menu” of learning strategies, individuals and teams will be better able to make decisions about how, why and with whom they plan their continued capacity building. The Road Ahead complements the BSO Capacity Building Roadmap and is one of a suite of tools available to support capacity building.

... IS CAPACITY BUILDING?

For the purposes of this document, capacity building refers to the ongoing process of learning in order to improve your practice or to support others to improve their practice. That is, you are always striving to build your capacity to do great work!

... IS THE TARGET POPULATION?

Older adults with, or at risk for, responsive behaviours associated with complex mental health, addictions, dementia and other neurological conditions; and their caregivers.

WHO

... IS “THE ROAD AHEAD” FOR?

This tool can be used by anyone at any level in the health system (individual, team, organization, regional, provincial, etc.) to organize their own approach to support life-long learning as informed by their context, set of skills and experiences.

WHEN

... WOULD YOU USE “THE ROAD AHEAD”?

This tool can be used as a “next step” to the framework provided in the BSO Capacity Building Roadmap, or on its own as a resource, to support practice at any point in a health care provider’s career.

WHY

... WOULD YOU USE “THE ROAD AHEAD”?

You might be wondering, what’s in it for me? Well, using “The Road Ahead” can:

1. Support self and team directed capacity building
2. Enable systems, organizations, teams, and individuals to build capacity together
3. Support the navigation of resources and tools available for capacity building
4. Inform organizational, team or individual learning plans
5. Support communication within and between key people related to your work

HOW

... CAN YOU USE "THE ROAD AHEAD"?

- **INDIVIDUAL:** An individual may, after a read-through, keep this tool at their fingertips as a quick reference for either creative short-term ideas or long-term learning plans
- **TEAM:** A care team may use this tool to plan and support a collaborative approach to learning
- **EDUCATION PLANNER:** An education planner may use this tool to consider new approaches to deliberately and effectively engage in lifelong learning and inform decisions regarding learning plans
- **ORGANIZATION:** A local service provider organization may use this tool to identify ways that they can actively create environments that foster capacity building of staff in their organization
- **ACADEMIC INSTITUTION:** An academic institution or non-governmental organization may use this as an education development tool to support continuing education and the development of clinical learning systems
- **CAPACITY BUILDING COORDINATOR:** A capacity building coordinator or LHIN BSO Lead may use this tool to consider regional strategies to support the continued capacity building of service provider organizations and health care providers

BUILDING ON THE BSO CAPACITY BUILDING ROADMAP

In February 2012, organizations hiring people under the Health Human Resources funding of the Behavioural Supports Ontario project were provided with a set of 12 Recommended Core Competencies. These core competencies were the foundation of the BSO Capacity Building Roadmap, which was intended to guide the hiring and initial (i.e. first 6 months post-hire) capacity building plans for each staff person.

Many components of these core competencies are fluid and dynamic. The system and landscape, policies and regulations, programs, projects and initiatives, not to mention the people behind them, are just a few examples of key sources of inform-

ation and knowledge that are almost continuously in flux. The achievement of these core competencies is a continuous process.

As new information and knowledge emerge from research and practice, staff working with this target audience can change and improve their approach to care as it relates to these 12 core components of practice. For more information on these 12 core competencies and their components, refer to the BSO Capacity Building Roadmap (<http://akeresourcecentre.org/files/BSOResources/BSO%20capacity%20building%20roadmap.pdf>). (1)



The Road Ahead is about “how” to continue to achieve excellence in the core competencies rather than about “what” needs to be achieved by “when”. The BSO Capacity Building Roadmap enabled a degree of universal achievement of the core competencies by the end of 6 months post-hire.

After 6 months, staff will have learning needs that vary from each other and learning at this point needs to be more self and team directed. Ultimately, the care team is strengthened when there is a deliberate, collaborative and life long approach to learning.

THE ROAD AHEAD: CONTENT FRAMEWORK

10 LEARNING STRATEGIES

This tool will examine 10 different approaches to learning that can be used at the individual, team, organization or system level by those interested in enhancing the development of the 12 core competencies and building capacity in an ongoing way.

The 10 learning strategies outlined in the following pages are listed on the right.

| | |
|--------------------------------|----|
| FACILITATED LEARNING PROGRAMS | 1 |
| QUALITY IMPROVEMENT STRATEGIES | 2 |
| REFLECTIVE PRACTICE | 3 |
| ONLINE ENVIRONMENTAL SCANNING | 4 |
| COLLABORATIVE TEAM LEARNING | 5 |
| MENTORING AND JOB SHADOWING | 6 |
| COMMUNITIES OF PRACTICE | 7 |
| CASE-BASED SOLUTION FINDING | 8 |
| KNOWLEDGE EXCHANGE EVENTS | 9 |
| NETWORKING | 10 |

HOW THIS TOOL IS ORGANIZED

To help organize this information, we have provided a rationale for why this learning strategy is worth considering and provided considerations for the road ahead (i.e. how to use this strategy). Finally, each strategy includes tips for how the learner can be enabled at various levels including:

- **INDIVIDUAL:** what the individual can do to enable the application of the learning strategy
- **TEAM:** what the combination of care providers working together for the person and their caregiver can do to enable the application of the learning strategy
- **ORGANIZATION:** what an organization can do to enable the application of the learning strategy
- **SYSTEM:** what those working in or observing at a systems level, across all points of care, can do to enable the application of the learning strategy

To help organize the information, a framework is applied to the road ahead that was adapted from the Canadian Health Services Research Foundation (CHSRF). The CHSRF framework was originally proposed as a self-assessment of an organization's readiness to apply evidence in practice. (2)

In the context of this tool, we have adapted the framework to help organize the “hows” of implementing strategies for individual lifelong learning:

- **ACCESS:** How can you access opportunities related to this learning strategy?
- **ASSESS:** How can you make the best use of this learning strategy given the situation at hand?
- **ADAPT:** How can you adapt this learning strategy so you can use it in your real-world role?
- **APPLY:** What should you consider to help you or others apply this learning strategy?

HOW THIS TOOL WAS CREATED

The Alzheimer Knowledge Exchange (www.akeresourcecentre.org) lead the development of this resource as a complementary tool to The Behavioural Supports Ontario Capacity Building Road Map. This tool was funded by the Behavioural Supports Ontario project (www.bsoproject.ca) and produced by Gestalt Collective (www.gestaltcollective.com).

For more information about the Behavioural Supports Ontario project, please visit www.bsoproject.ca

1 FACILITATED LEARNING PROGRAMS

RATIONALE

There are many formal, facilitated learning programs available for people working with this population. Examples include but are not limited to:

P.I.E.C.E.S.[™], U-First!, Gentle Persuasive Approaches, Montessori, Reitman Centre CARERS Program, Ontario College of Family Physicians' Behavioural and Psychological Symptoms of Dementia program, Public Services Health and Safety Association's Developing a Workplace Violence Prevention Program Education Series

These programs are evidence-based and provide structured and evaluated opportunities, either in-person, online, or through hybrid delivery methods. They offer comprehensive learning and frameworks to inform care approaches specific to this population.

ACCESS

How you can access this learning strategy

Many of the formal, facilitated learning programs have their own websites. Tools such as the Alzheimer Knowledge Exchange (AKE) Resource Centre and the Behavioural Educational Training and Supports Inventory have lists of available programs assembled in one place: www.akeresourcecentre.org/BETSI. Many programs have registration fees and back-fill considerations that affect overall costs to the organization.

ASSESS AND ADAPT

How you can make best use of and adapt this learning strategy given your context

The Behavioural Educational Training and Supports Inventory (BETSI tool) (3) will assist organizations in determining:

- whether they need education
- whether they are able to support practice change
- what educational opportunities are available to them
- the components necessary to ensure effective implementation and to sustain investments and
- how these programs align with the BSO target population, core competencies and service functions

BETSI helps ensure that education and training investments are targeted correctly and scaled appropriately.

In addition, facilitated, formal learning programs are often delivered outside of your individual and organizational context. Practical applications and case studies can help you and your team adapt the program content to your real-world work environment. Also, consider:

- how policies, process, traditions, organizational culture, etc. may affect how you apply new knowledge
- adaptations that are small and incremental, made with purpose, tested, and then discussed in terms of their success (or lack thereof) before permanently applied
- seeking support and ideas from other learners or past alumni

APPLY

What you should consider to help you with this learning strategy

The following are examples of how you and others could use or support the use of this learning strategy:

| | |
|---|--|
| <p>System Level</p> <ul style="list-style-type: none">• Governments employ long-term integrated planning and policies based on a vision for continuous capacity building and associated funding structures• Support partnerships and knowledge sharing networks with appropriate funding and technology to enable networks of support for learners• Regional planners organize education opportunities that fit with capacity building needs expressed by individuals and organizations | <p>Organizational Level</p> <ul style="list-style-type: none">• Use the BETSI Tool to identify if and what kind of education might be needed.• Provide protected and scheduled time for staff to share what they learned within and across the organization• Provide an infrastructure of support (policies, time, access to online or teleconference technology, travel budget, registration fees, backfill, etc.) to enable the participation in facilitated learning programs |
| <p>Team Level</p> <ul style="list-style-type: none">• Use existing case-based team discussions to include reflections and strategies based on what was learned• Include the whole team or at least several members of the team in facilitated learning programs so team members can support each other in applying what they learned and act as a collaborative resource to spread and sustain learning | <p>Individual Level</p> <ul style="list-style-type: none">• Choose facilitated learning programs that meet your learning needs and style where possible• Plan and test small, incremental practice changes based on new knowledge• Take the time to reflect on the outcomes/ results of those practice changes and make a deliberate (and informed) decision about whether or not to continue with/adapt the change |

IN PRACTICE: *“As Regional Manager with North East BSO, I have been witness to impactful system transformation as a result of transcending formal education programs, such as P.I.E.C.E.S. & U-FIRST! into pervasive practical application. These foundational platforms have enabled us to awaken creative ideals and embrace the notion that all the pieces must come together in order to attain a completed puzzle. An example of this collective practice in the North East is the creation of a new screening tool called “PIECES of my PERSONHOOD”. Ultimately, the person is at the centre of this care revolution!”*

2 QUALITY IMPROVEMENT STRATEGIES

RATIONALE

These processes can effectively enhance understanding of and skills related to change management, team performance and collaboration. Quality Improvement (QI) processes are driven by the unique needs of your context and focus on frequent and rapid cycles of change. QI processes can be an effective and fast way to deliberately apply practice-based and research-based knowledge, while incorporating the experience of the person and caregiver. Given our environments are constantly changing, considering and adapting your practice is an important part of lifelong learning.

ACCESS

How you can access this learning strategy

Ontario has invested in an infrastructure to support QI processes across the health system. Health Quality Ontario is a provincial leader in this work and provides a variety of helpful guides, tools, and training opportunities (www.hqontario.ca). In addition, the BSO Project has resulted in some Improvement Facilitators being hired to support QI change projects in Local Health Integrated Networks. Many long-term care homes are also participating in the Residents First initiative, another source of support for QI in the workplace (www.residentsfirst.ca).

ASSESS AND ADAPT

How you can make best use of and adapt this learning strategy given your context

QI tools are designed to allow you to continually adapt your practice based on new information and reflection. There are many QI tools and approaches that generally fall under four main categories:

- defining your project
- measurement
- analyzing your system
- testing and implementing change

HQO provides information to help you and your team make decisions about which approach might best fit your needs:

http://www.hqontario.ca/en/qi_teams.html.

Changes to practice are meant to be very context-specific and the process of adapting the change will likely happen as you work through the QI process. QI changes are not meant to be permanent or stagnant. Once you've applied a practice change, don't get too comfortable! Take time to periodically question if that change is still working for you, your team, and your organization. If your context or environment changes, your approach may need to as well.

APPLY

What you should consider to help you with this learning strategy

The following are examples of how you and others could use or support the use of this learning strategy:

| | |
|--|---|
| <p>System Level</p> <ul style="list-style-type: none">• A commitment is made to QI at a system level and the language and processes are integrated for a common approach to rapid-cycle change (e.g. RNAO Best Practices Toolkit, Residents First) | <p>Organizational Level</p> <ul style="list-style-type: none">• Provide dedicated opportunities to participate in facilitated QI processes• Invest in dedicated internal QI champions to take a leadership role in organizational QI processes |
| <p>Team Level</p> <ul style="list-style-type: none">• Participate in QI change processes and proactively identify opportunities to improve quality | <p>Individual Level</p> <ul style="list-style-type: none">• Intentionally share personal practice-based knowledge to inform QI change processes |

IN PRACTICE: *“Quality Improvement is the key to future success by creating light around an opportunity rather than heat around a problem. Working from a quality improvement mindset has allowed us in the Mississauga Halton LHIN to explore options that weren’t previously considered. It has engaged our staff on a much more personal level thus facilitating organizational change. A focus on quality improvement has expanded the creativity of providers, enhanced collaboration and contributed to a learning environment for all staff.”*

3 REFLECTIVE PRACTICE

RATIONALE

In the day-to-day reality of your work, you may find it hard to stay connected to your core principles or philosophy of care (e.g. person-centred care). Using reflective practice can help keep you grounded in why you are doing this work and how you can continue to improve.

Reflective practice is an important tool in practice-based settings where you value and learn from your own professional experiences; a key strategy for health professionals who embrace lifelong learning.

Reflective practice can take place during or after care and entails: (4)

- reflecting on the experience
- gaining a general understanding of the concepts encountered during the experience
- testing these general understandings on a new situation

ACCESS

How you can access this learning strategy

There are essentially no barriers to access for this learning strategy. If you have a practice, you can reflect on it! This strategy requires a commitment from you to think about what you have done, what went well, what could have been better, how you felt about it and what you would do differently next time. Access to opportunities for reflective practice; however, can be greatly affected by the organization. A safe and supportive space is required in an organization to allow the individual and team to adapt and adopt when good ideas are realized.

ASSESS AND ADAPT

How you can make best use of and adapt this learning strategy given your context

Reflective practice is individualized and self-directed; however, there are many models and frameworks that can guide your reflective practice. Matching an approach with your own style, preference, or environment may help you engage in this learning strategy in an organized and deliberate fashion and potentially with greater impact.

Check out some of the following approaches for more information on reflective practice:

- “Critical Reflection in Nursing and the Helping Professions: A User’s Guide” (5)
- “Becoming a Critically Reflective Teacher” (6)
- “Professional Development for Educators of Adults. New Directions for Adult and Continuing Education” (7)
- “Preparing the Reflective Practitioner: Transforming the Apprentice through the Dialectic” (8)
- “Experiential learning: Experience as the source of learning and development” (9)

Many others have worked with, adapted and written about these approaches to reflective practice and their work can be found easily online.

Central to the concept of reflective practice is being empowered to make a change to your approach based on what you have learned. Certain changes to practice are more high risk than others and before you adapt your practice you may want to share your experience with others, ask them about their experiences and consider other sources of information to inform your decisions where patient care is concerned.

APPLY

What you should consider to help you with this learning strategy

The following are examples of how you and others could use or support the use of this learning strategy:

| | |
|--|---|
| <p>System Level</p> <ul style="list-style-type: none">• Embrace reflective practice as a philosophy and integrate into language and communications to encourage individuals to use it themselves• Create and make available tools and templates that support reflective practice. | <p>Organizational Level</p> <ul style="list-style-type: none">• Encourage staff to embrace and value their own experience and help create a culture that values experiential learning and making change based on that learning• Support the development and use of self-assessments to guide individual and team reflection• Provide time and processes that allow for reflection on practice (e.g. reflection and discussion built into training events, cues or prompts in clinical note-taking that trigger reflection) |
| <p>Team Level</p> <ul style="list-style-type: none">• Model reflective practice by talking through a situation together• Encourage team members to reflect on their individual practice by asking prompting questions during case discussions or reviews | <p>Individual Level</p> <ul style="list-style-type: none">• Protect time in your personal schedule each day to reflect on your experiences and capture your reflections as notes to build on in the future• Be brave in trying out new strategies based on your reflections and discussions with others on your team• Share your reflections and successes with others! |



IN PRACTICE: *“As a nurse and educator in the South East LHIN, I believe that reflective practice is absolutely critical. Integrating your learning through experiences with patients, continuous education and research, and taking the time to reflect on all of this makes you more effective in the work that you do. This has not only been shown to improve patient outcomes, but it has tremendous impact on healthcare practitioners health and wellbeing.”*

4 ONLINE ENVIRONMENTAL SCANNING

RATIONALE

Successful health care depends on the ability of care providers to adapt to a rapidly changing external environment. Ten years ago, navigating resources online wasn't a required skill; however, the current-day health professional is inundated with new knowledge available to inform their practice. The ability to access, adapt and apply this information has become a critical component of lifelong learning.

Person and caregiver directed care requires both interpersonal and critical thinking skills. The skilled staff member must be able to strategically source out information to inform care delivery, as well as work collaboratively to apply this knowledge. Knowing what strategies to use requires a commitment to seeking out and reviewing resources for new information and knowledge that can guide your decision-making to provide the best possible care.

ACCESS

How you can access this learning strategy

Navigating the resources available online can be a huge task. Fortunately, there are many organizations and networks that are working hard to make this job easier for you. Networks such as the Canadian Dementia Resource and Knowledge Exchange, Alzheimer Knowledge Exchange, the Senior's Health Research Transfer Network, the Canadian Coalition for Senior's Mental Health, the Mental Health Commission of Canada, National Initiative for the Care of the Elderly (among others) offer resource repositories or exchange platforms that link the learner to timely, relevant knowledge from research evidence, practice based experience and lived-experience perspectives. Some even provide support from staff to find answers to the questions you have.

In addition to these networks and organizations, a few other strategies that can help connect you to what is going on in the sector include (but are not limited to):

- **E-NEWS PUBLICATIONS:** many organizations in the health sector offer monthly, quarterly or annual e-news publications (that come through an email account) (e.g. the CDRAKE Pulse, My AKE Connection, CCSMH Connections, Longwoods Publications, etc.)
- **ONLINE JOURNALS:** There is a growing trend to offer free access to journal articles online, health professionals can sign up for free and receive email notifications and access downloadable journal articles regarding innovations in the health sector (e.g. Implementation Science)
- **SOCIAL MEDIA:** hundreds of thousands of people are talking about providing quality care online (e.g. on Facebook, LinkedIn, Twitter, etc.). Access to these sites at your organization may be an issue depending on internal policy; however, if not, then a great deal of knowledge can be found this way

ASSESS AND ADAPT

How you can make best use of and adapt this learning strategy given your context

Finding the information online may be the first step; however, the skilled learner must be able to quickly review and appraise the value, trustworthiness and relevance of the knowledge found. The kinds of organizations listed above apply a quality lens to information prior to linking users to it; however, individual judgment is still required.

There are many tools and resources available online to help develop critical appraisal skills. (10) In addition, in Ontario, there are some human resources available through the Senior's Health Knowledge Network (i.e. Information

Specialists) that can also assist with critical appraisal skill development (www.shrtn.on.ca).

From scientific journal articles to practical and user-friendly job aides, the amount of adaptation required for resources found online will vary widely. Consider:

- working with others to get creative and translate information for use in practice (e.g. in the creation of practical tools)
- small, incremental changes based on the quality evidence you find online
- the importance of good visual design when creating tools to support practice change

APPLY

What you should consider to help you with this learning strategy

The following are examples of how you and others could use or support the use of this learning strategy:

| | |
|---|--|
| <p>System Level</p> <ul style="list-style-type: none">• Invest in the infrastructure of knowledge networks who help synthesis and provide access to quality information about care practices• Identify and share relevant online information and resources broadly and support discussions on how it could be used to improve practice | <p>Organizational Level</p> <ul style="list-style-type: none">• Allow time and access to technology during the work day for staff to access online resources• Use processes that allow for sharing of useful online resources (e.g. standing agenda item at staff meetings, section in your newsletter, bulletin board for posting links and articles) |
| <p>Team Level</p> <ul style="list-style-type: none">• Prioritize information needs and share the online scanning load with team members• Provide opportunities for team members to share information found online and discuss as a team how it applies to your setting | <p>Individual Level</p> <ul style="list-style-type: none">• Plan ahead for what you would like to find before getting on shared computers to help others have access during the work day• Educate yourself about how to assess the quality of information you find online.• Take advantage of groups (e.g. those mentioned above) that already synthesize information for application in a care setting• Consider how what you learn could be applied within your context |

IN PRACTICE: *“Comprehensive communication strategies account for both the push and pull of information. For BSO, environmental scanning – the process of gathering information from a variety of sources to identify, interpret and learn about emerging trends – has to be proven integral in a proactive effort to pull information. Recognizing that BSO is also a trend in and of itself, the ability to synthesize and convey (i.e., push relevant and meaningful information, through such online publications as eNews) has proven equally important to the successful implementation of an effective communications strategy.”*

5 COLLABORATIVE TEAM LEARNING

RATIONALE

The pool of knowledge and skill available in a team is another source for learning. Collaborative learning is when two or more people learn something together. Unlike individual learning, a team engaged in collaborative learning can capitalize on each others' ideas, strengths and resources. Reflecting on and solving problems in a collaborative team environment enhances each person's skill, which contributes to a higher team performance and also may illuminate any gaps in performance to be closed.

ACCESS

How you can access this learning strategy

There likely are already many opportunities for collaborative team learning in your work environment. Recognizing and capitalizing on them will help provide dedicated time to reflect on and learn from the experiences of others. For example, opportunities for this approach may exist during:

- shift change meetings
- case reviews
- “team huddles”
- care planning meetings
- operational or managerial meetings
- QI events (e.g. Kaizen events)
- in-services

In addition, consider:

- opportunities for anonymous sharing; even with ground rules set, there is a portion of the population that will not feel comfortable sharing in a group setting, yet have important perspectives to contribute
- learning collaboratively with other team configurations within the organization to provide different perspectives and enhance the learning experience

ASSESS AND ADAPT

How you can make best use of and adapt this learning strategy given your context

Sharing experiences and learning with others can be challenging. To help guide your collaboration, Spence (2006) identifies seven “rules” that can be applied and used in all collaborative learning situations: (11)

1. **LOOK FOR COMMON GROUND:** find shared values, consider shared personal experiences, pay attention to and give feedback, be yourself and expect the same of others, be willing to accept differences in perception and opinions
2. **LEARN ABOUT OTHERS:** consider their perspectives and needs, appeal to the highest motives, let others express themselves freely
3. **CRITIQUE RESULTS, NOT PEOPLE:** do not waste time on personal hostility, make other people feel good, avoid criticism and put downs
4. **GIVE AND GET RESPECT:** show respect for others' opinions, be considerate and friendly, put yourself in the other person's shoes, be responsive to emotions, speak with confidence but remain tactful
5. **PROCEED SLOWLY:** present one idea at a time, check for understanding and acceptance of each idea before moving on to the next. Speak in an organized and logical sequence.
6. **BE EXPLICIT AND CLEAR:** share your ideas and feelings, pay attention to nonverbal communication, speak clearly and make eye contact, select words that have meaning for your listeners
7. **REMEMBER THE FIVE “C”s OF COMMUNICATION:** clarity, completeness, conciseness, concreteness, and correctness

Collaborative learning activities can include group projects, joint problem solving, debates,

collaborative writing and other activities. Ideally, the process of collaborative learning will lead to learning outcomes that are already adapted for your own context.

APPLY

What you should consider to help you with this learning strategy

The following are examples of how you and others could use or support the use of this learning strategy:

| | |
|---|--|
| <p>System Level</p> <ul style="list-style-type: none"> • Create sector specific guidelines and suggestions for team based learning • Include a focus on collaborative learning during meetings that involve system partners • Include opportunities to learn across organizations at regional/provincial/national events | <p>Organizational Level</p> <ul style="list-style-type: none"> • Encourage collaborative learning groups by identifying and connecting staff with common learning interests (e.g. from learning plans) • Provide time for team discussions with a focus on learning |
| <p>Team Level</p> <ul style="list-style-type: none"> • Protect time to engage in team discussion (either case or topic based) • Protect time to engage in team debriefs after interventions • Create a safe environment for team learning (i.e. make sure all voices are included and respected) | <p>Individual Level</p> <ul style="list-style-type: none"> • Contribute your ideas, opinions, expertise openly and respectfully • Actively listen to what others have to say with an open mind • Use what you learn with and from others in your own practice and then share the results! |



IN PRACTICE: *“When front-line staff in the North Simcoe Muskoka LHIN are at a loss for what to do next or how to improve processes, it has been extremely beneficial to engage staff in collaborative learning activities where they are given the opportunity to see others perspectives, draw from others strengths and build relationships. Outcomes are positive and sustainable. There is a mutual respect developed and team work increases.”*

6 MENTORING AND JOB SHADOWING

RATIONALE

Peer to peer learning is an effective strategy for capacity building. You can apply knowledge and reflect on practice in real time and in the real world, with the safety and support of a having a peer alongside. Mentoring can effectively spread the innovative practices of a few champions, across an organization or region. Job shadowing helps you to learn about different jobs within and across organizations to create a deeper understanding of the system within which you work and how it relates to your own role.

ACCESS

How you can access this learning strategy

To access this learning strategy, you may need to alert your supervisor that you are interested in obtaining a mentor or shadowing someone else in their work as a means to better your own understanding and skills. As there may be resource or scheduling implications to this approach, working collaboratively with the organizational administration may help get things started.

ASSESS AND ADAPT

How you can make best use of and adapt this learning strategy given your context

You and your administrators can work together to find the suitable mentor to help meet your learning needs. When determining who that person might be, consider looking outside of your team or even your organization, depending on what you want to learn. The strength of this approach is that you are learning while doing and building cross-team/organizational relationships at the same time. Learn more about mentoring online (e.g. the International Mentoring Association: <http://mentoring-association.org/>).

APPLY

What you should consider to help you with this learning strategy

The following are examples of how you and others could use or support the use of this learning strategy:

| | |
|--|--|
| <p>System Level</p> <ul style="list-style-type: none">• Maintain a list of willing mentors and people willing to be shadowed for cross-organization capacity building• Share guidelines and tools for effective job shadowing and mentoring• Provide training to those in mentoring/coaching roles | <p>Organizational Level</p> <ul style="list-style-type: none">• Provide formal job shadowing opportunities for staff (internally and with external partners)• Establish a mentorship program for new staff, pairing them with more experienced counterparts• Designate and build the skills of in-house mentors through training and access to support such as communities of practice. |
| <p>Team Level</p> <ul style="list-style-type: none">• Dialogue after an intervention• Create opportunities for staff to develop mentorship skills by allowing each member to take turns leading team or case discussions• Match members of a team with different skill levels to work together on a case, problem or issue at hand | <p>Individual Level</p> <ul style="list-style-type: none">• Champion 'in the moment' mentorship opportunities by demonstrating skills in real time and engaging in dialogue immediately after an intervention• Speak up if you feel you could benefit from mentorship or job shadowing and share what would be most beneficial for you about this arrangement so the right match can be found• Offer yourself as a mentor or person willing to be shadowed if you feel you have experience, skills and knowledge to share• If you're a mentor brush up on your coaching skills so you can do the best job possible! |



IN PRACTICE: *“Recently, I was afforded the opportunity to job shadow a colleague with the Client Intervention & Assistance Program at Family Service Kent. This experience not only provided me with insight into my colleague’s role as a Crisis Intervention Worker, it also highlighted the complexity of cases she encounters on a daily basis, involving hoarding, elder abuse, transitional care planning, etc. Through this hands-on experience, I was able to see how our differing positions are complementary in providing our clients with a wrap-round approach to services, which facilitates effective and person-centered care for those affected by responsive behaviours.”*

7 COMMUNITIES OF PRACTICE (CoPs)

RATIONALE

Knowledge can be created when individuals actively share experiences from their different roles and perspectives. Sometimes known as Communities of Practice (CoPs) or Collaboratives, these groups of people commit to share learning, consciously develop new knowledge, and share discoveries with others engaged in similar work, in order to advance individual and organizational practice. (12) This learning strategy not only enables cross-sector learning opportunities, but also supports leadership and knowledge exchange skill development.

ACCESS

How you can access this learning strategy

The development of CoPs is a growing trend. Many are available either online or in-person across Ontario and are focused on various care practices and populations. Often CoP's are embedded in existing networks. For a few listings of existing provincial CoPs, check out CoPs that are supported by the AKE or Seniors Health Research Transfer Network online at www.akeresourcecentre.org and www.shrtm.on.ca respectively. In addition there may be organizational or regional CoPs for you to join; connect with your LHIN to find out more.

If you don't see what you are looking for, don't wait for the right CoP to find you! If you are passionate about something start small and get a group people together with a shared desire to discuss and improve the thinking or practice on a specific topic.

ASSESS AND ADAPT

How you can make best use of and adapt this learning strategy given your context

What makes a community of practice succeed depends on the purpose and objective of the community as well as the interests and resources of the members of that community. Potential CoP outcomes or goals can vary widely depending on the learning needs and priorities of the members but can often be categorized into the following: (13)

- **PEOPLE (NETWORK OF):** Building linkages and developing relationships between groups of people to facilitate the timely flow of knowledge, resources and expertise
- **PERCEPTIONS:** Changing perceptions and attitudes through personal reflection, reflective practice, and enhancing the awareness and understanding of others practice to break down barriers
- **POLICY:** Developing or influencing evidence-informed policy (organizational policy or public policy at the local, regional, provincial levels)
- **PRACTICE/PERFORMANCE:** Focusing on closing gaps in practice or performance, based on needs assessment and gap analysis (may include education strategies)
- **PROBLEMS (IDENTIFICATION OF):** Identifying and communicating gaps in system, organizational, policy or professional practice through gap analysis and needs assessment, and thinking creatively about potential solutions to close gaps
- **PROCESSES (KTE):** Creating a process that could be replicated in another CoP or context that facilitates the flow of information or the application of knowledge to practice

- **PRODUCTS:** Development of products and tools to support practice (for example, assessment forms, CDs and laminates containing relevant resources and tools, clinical care resources, evidence based briefs, executive summaries for policy makers and researchers, guidelines for decision making, job aides, newsletters)

In addition to considering the desired outcomes of the exchange, Wenger has identified seven other tips that can help cultivate a healthy CoP: (14)

1. design the community to evolve naturally
2. create opportunities for open dialogue within and with outside perspective
3. welcome and allow different levels of participation
4. develop both public and private community spaces
5. focus on the value of the community
6. combine familiarity and excitement
7. find and nurture a regular rhythm for the community

It is important to note that CoPs require some level of support, either from a knowledge broker or CoP lead, to support meaningful engagement (e.g. in-person meetings, teleconference lines, web platforms, etc.). This support may be sought from an organization, network, funding agency or other groups.

APPLY

What you should consider to help you with this learning strategy

The following are examples of how you and others could use or support the use of this learning strategy:

| | |
|---|---|
| <p>System Level</p> <ul style="list-style-type: none">• Support partnerships and knowledge sharing networks with appropriate funding and technology to enable communities of practice and other learning groups• Provide common resources, templates, tools and guidelines to those who support knowledge transfer and exchange in their roles• Support the creation of networks or CoPs to connect those who lead knowledge transfer and exchange activities• Host opportunities for CoPs to share knowledge and resources that they have developed | <p>Organizational Level</p> <ul style="list-style-type: none">• Encourage the development of in-house CoPs by connecting staff with a common interest to address specific issues or topics• Acknowledge and honor CoP efforts and outcomes by providing opportunities to share what has been learned with others (e.g. newsletter, presentations in-house or for the public, support participation in conferences to share learnings)• Integrate knowledge transfer and exchange responsibilities within the role of one or more staff• Foster the development of knowledge transfer and exchange skills in champions within the organization by offering training opportunities and connecting them with others in a similar role |
| <p>Team Level</p> <ul style="list-style-type: none">• Encourage team members to participate in CoPs by sharing information about opportunities available and providing time to participate• Have members of the team share their learnings with the team and get input from the team about work of the CoP(s) they're involved in | <p>Individual Level</p> <ul style="list-style-type: none">• Choose CoPs that are a good fit for your learning needs• If no existing CoPs fit your needs consider bringing others together to start one• Be an active member of any CoP you are part of and you will get more out of it!• Spread the learning and show the benefits of being part of a CoP to others |



IN PRACTICE: *“Participating in the provincial Mobile Teams collaborative has provided me an opportunity to learn and exchange ideas and best practices with provincial partners. Prior to the creation of this collaborative, there were no formal structures for geriatric mental health mobile teams to connect and work together. It has reduced the isolation and created a forum for discussion of common issues with a focus of practice improvement.”*

8 CASE-BASED SOLUTION FINDING

RATIONALE

The skilled staff member must be able to strategically source out information to inform care delivery, as well as work within a broad circle of care to collaboratively apply this knowledge. Case-based discussion can be a way to solve new problems based on the solutions of similar past problems and is an effective way to apply and integrate multiple knowledge streams to real-world scenarios. Also referred to as scenario-based learning and planning, scenarios may include both the person's clinical and service journey.

ACCESS

How you can access this learning strategy

Similar to collaborative team learning, there are likely many opportunities already available to you to leverage for case-based solution finding. In addition to existing, in-house opportunities such as shift change meetings, case reviews, “team huddles”, care planning meetings, operational or managerial meetings, QI events (e.g. Kaizen events) and in-services; you may also consider leveraging networks, communities of practices and other groups for case-based discussions.

ASSESS AND ADAPT

How you can make best use of and adapt this learning strategy given your context

To make the most of your case-based discussions, consider cases that are factually-based and complex that allow for the exploration of realistic and specific situations. Keep in mind you are considering problems

to which there may not be one single right answer. As a participant in case-based learning you may: (15)

- engage with the characters and circumstances of the story
- identify problems as you perceive them.
- connect the meaning of the story to your own life
- bring your own background knowledge and principles
- raise points and questions, and defend your positions
- formulate strategies to analyze the data and generate possible solutions
- may not agree, and sometimes reach a compromise

There are several different case study formats, including but not limited to: (16)

1. extensive, detailed, written case study
2. descriptive, narrative cases, parts of which are given successively over multiple meetings
3. mini cases designed to be used in a single meeting, tightly focused
4. bullet cases consisting of two or three sentences with a single teaching point.
5. directed case study consisting of short cases followed immediately with highly directed questions

Consider both fiction and non-fiction cases for discussion. Always keep in mind the limitations and parameters of privacy for the person and his or her caregivers while engaging in real-world case-based discussions. Choosing the right case study and discussion format for you and your team may help you in your learning application.

APPLY

What you should consider to help you with this learning strategy

The following are examples of how you and others could use or support the use of this learning strategy:

| | |
|--|--|
| <p>System Level</p> <ul style="list-style-type: none">• Incorporate case-based discussions within learning events and cross-agency or cross-sector meetings | <p>Organizational Level</p> <ul style="list-style-type: none">• Provide resources and templates to support case-based discussion processes• Showcase successful practices and outcomes that have resulted from case-based discussions |
| <p>Team Level</p> <ul style="list-style-type: none">• Protect time for regular case-based discussion of complex clients• Try out different case formats and approaches to discussing cases and adapt to fit team needs or the situation at hand• Consider how you might store, share and make accessible case studies and strategies that were developed with others or for future reference | <p>Individual Level</p> <ul style="list-style-type: none">• Bring forward complex cases for collaborative discussion• Add your experience and knowledge during case-based discussions |

IN PRACTICE: *“In North Simcoe Muskoka, huddles across organizations allow us to take an interdisciplinary approach to brainstorming strategies and solutions, and allows us to take a holistic approach to the resident’s care.”*

9 KNOWLEDGE EXCHANGE EVENTS

RATIONALE

Knowledge exchange (KE) opportunities connect you, in real time, to relevant research, practice-based evidence and lived-experiences. These in-person or online exchanges with peers facilitate the flow of information and knowledge and may use a variety of low-tech or higher-tech platforms to support engagement (such as teleconference lines, online meeting or webinar software). KE events are not passive, didactic learning opportunities. Through intentional design and facilitation, they offer more than two-way exchange. KE events provide an opportunity to actively engage with knowledge from many sources, and generate new knowledge.

ACCESS

How you can access this learning strategy

One of the greatest advantages of participating in KE events is that you have a protected time to learn and exchange with people you wouldn't have access to on a day-to-day basis. There are many networks, organizations, and projects that offer opportunities to engage in KE events. In-person events are more likely to have a fee associated with them; however, there are some free events available to those within a reasonable travel distance. Otherwise, there are a wide variety of free online events (sometimes referred to as webinars) to participate in. Both in-person and online events can be often found through the online publications from various networks or organizations (e.g. the Alzheimer Knowledge Exchange, Seniors Health Knowledge Network, the Canadian Dementia Resource and Knowledge Exchange).

ASSESS AND ADAPT

How you can make best use of and adapt this learning strategy given your context

Participating in KE events is a self-directed decision; you know what you need to learn and what interests you. However, choosing where to invest your time can be helped through conversations with your team and/or administrators as they may identify other team or organization learning needs.

Look for opportunities that:

- offer a wide number of perspectives
- have at least some individuals with a lot of experience in the topic
- will provide time to allow you to share your successes
- strive to help you develop solutions to your challenges
- offer opportunities and support to remain connected either with the subject matter experts, participants or both

APPLY

What you should consider to help you with this learning strategy

The following are examples of how you and others could use or support the use of this learning strategy:

| | |
|---|---|
| <p>System Level</p> <ul style="list-style-type: none">• Governments and other system leaders provide funding to support in-person exchange opportunities• Regional leaders bring together representatives from different sectors or organizations across the region to share knowledge in order to improve systems or practice | <p>Organizational Level</p> <ul style="list-style-type: none">• Make staff aware of knowledge exchange opportunities• Provide access to technology required• Provide funding / time off to enable staff to participate in virtual and in-person exchange opportunities• Provide ways for staff to share their learning with others in the organization |
| <p>Team Level</p> <ul style="list-style-type: none">• Use a process for staff sharing of what was learned through a knowledge exchange event and discuss how it could be applied to your context• Encourage multiple members of the team to participate so that they can support each other after the event | <p>Individual Level</p> <ul style="list-style-type: none">• Become aware of KE opportunities available to you and spread the word to others• Choose wisely! Find opportunities that will meet your needs• Reflect on what you learned and how it could be applied to your practice, then share this with your team |

IN PRACTICE: *“We held a knowledge exchange event at the request of the new hires to the Central BSS Mobile Support Team serving the long-term care homes. They wanted to get a better understanding of their nursing and personal support worker roles by linking with a similar team from the buddy Early Adopter NSM LHIN who had already been on board for approx 3 months prior. From the day, we heard feedback such as “I’m so glad we had this day” and “I’m excited to get started and I feel much more confident about my new job”. During the day’s facilitated discussion the staff discussed some of the anticipated challenges going into the long term care homes and everyone agreed that they would like to reconvene in about six months after they had some experience serving actual residents in the LTCHs to regroup and share experiences, successes and barriers within a peer group setting where they felt ‘safe’ to talk.”*



10 NETWORKING

RATIONALE

Within the health care system the pressure to continuously improve and grow comes from all sides: government regulations and initiatives, an emphasis on doing more with less, and improving the quality of care and the care experience for a complex population. This responsibility however does not rest solely on you. Personal and professional networking provide connections to key people that can be accessed as needed to learn from and with. It takes a deliberate effort to develop and maintain networks, requiring skills to build and maintain relationships, but also the courage to reach out when you have questions or information to share.

ACCESS

How you can access this learning strategy

To access the vast knowledge within your own network, one must first spend time cultivating these relationships. This requires both passive effort (e.g. signing up to receive E-News publications from a specific group so you stay ‘in the know’ about what areas of knowledge they can offer), as well as active effort (e.g. participating in a cross-sector initiative so that you can build relationships with others in your community). To become a ‘connected’ learner, consider the following strategies:

- introduce yourself when meeting new people, explain what you do and what you are interested in and ask them about themselves (this sounds easy but can be very hard for some!)
- don’t hesitate to ask a person with certain experiences or expertise if you may contact them to discuss questions or issues related to your shared practice (it takes courage to do this!)
- talk to your colleagues in and outside of

your organization; do you have similar interests? What are their areas of expertise? For example, you may know of a case manager that has a particular scope of experience related to consent and capacity issues

ASSESS AND ADAPT

How you can make best use of and adapt this learning strategy given your context

Learning is about more than just asking people in your network a question so that you can get a direct answer (though sometimes this can be the case). Using a network as a learning strategy is about drawing on the right mix of people to engage in a discussion on a specific topic so that, together, you can learn more. Assess the questions you have and consider who in your network could contribute to furthering your knowledge on that topic.

Your network should include people within and outside of your organization. Leverage your network to seek creative solutions from outside of your work environment, then cross-check them with people within your organizational network.

APPLY

What you should consider to help you with this learning strategy

The following are examples of how you and others could use or support the use of this learning strategy:

| | |
|--|--|
| <p>System Level</p> <ul style="list-style-type: none">• Create and support opportunities for networking across all points in the system• Share information about existing network opportunities broadly | <p>Organizational Level</p> <ul style="list-style-type: none">• Provide protected time for staff to attend / participate in external network meetings• Encourage internal learning networks |
| <p>Team Level</p> <ul style="list-style-type: none">• Facilitate team sharing of interests and learning needs to foster connections• Leverage each others' networks when a question or learning need arises | <p>Individual Level</p> <ul style="list-style-type: none">• Once you've started to build these connections in a deliberate way, broaden your network by:<ul style="list-style-type: none">» Participating in internal and cross-sector initiatives (e.g. QI change projects, regional or provincial initiatives or projects, etc.)» Joining local existing networks (e.g. a long-term care learning collaborative) and engaging with them» Joining provincial or national networks or groups focused on specific topics of interest (e.g. CoPs) and getting involved» Joining online social networking groups such as Facebook, LinkedIn and Twitter, or participating in online discussion forums and make use of other environmental scanning techniques» Being accessible to members of your network when they are reaching out for information or exchange |

IN PRACTICE: *"I have consulted a colleague in the South East LHIN (buddy LHIN to the North West) on several occasions to ask him about how he approached a certain situation or issue. Even though the early-adopter LHINs were a little late getting going and therefore not much further along than us, it was still nice to have someone to go to when you were trying to figure something out."*

TRANSLATING KNOWLEDGE TO PRACTICE

Once the content from whatever learning strategy you and your team have engaged in has been adapted for use in your work environment applying new knowledge may still be an ongoing challenge. Changing practice is hard! Seek support and smart ideas by connecting with others. We are all working to apply new knowledge in practice and others can be valuable sources of creative application strategies. Keep in mind that lasting change can take a long time so it's important to celebrate the small successes along the way.

You could reflect on and adjust your practice every day...in fact you probably often make minor adjustments unconsciously already. By engaging in deliberate learning strategies to support lifelong learning, you can make better use of your own knowledge and experiences and put them to work for you. It is an ongoing cycle of individual learning.

As you apply knowledge you have gained, consider that individuals like yourself have taken time to make their knowledge available to you and, where possible, reciprocate by sharing what you have developed and learned with others. Team meetings, in-services, knowledge networks, discussions forums, social media, and communities of practice are just a few of the options available to you for sharing your knowledge. Without this altruistic, two-way knowledge sharing, our pool of available knowledge resources will not continue to grow and be available to those seeking information to inform practice change.

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