

The Practice of Patient-Centred Goal Setting: Using Lessons Learned to Move Forward

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Overview

- Rationale and components for effective patient-centred goal setting
- Best practices in goal setting education and sustainability framework
- Review of education evaluation and outcome measurement
- Lessons learned and recommendations



“...wanting to get back to where you were the day before...if they listened, they would hear those visions... they would break it down into steps...towards the goal...(That) would be great.”

Cott, 2004, p. 1415



What is goal setting?

- “Goal setting is ... a collaborative process whereby the patient, patient’s family and the rehabilitation team negotiate a set of shared goals.”

Stiegert & Taylor, 2004



Rehabilitation and Goals

Rehabilitation is a **goal-oriented**, time-limited process that enables individuals with impairments, activity limitations and participation restrictions to:

- identify and reach optimal physical, mental and/or social functioning level
- client-focused partnership with family, providers and the community
- focuses on abilities and aims to facilitate independence and social integration.

-World Health Organization



Goal Setting to Improve Patient Outcomes

- cost-effective by reducing treatment times Playford et al., 2000
- greatest gains made when goals focus on activities that are meaningful to patients Randell & McEwen, 2000
- assists patients to psychologically adapt Levack et al., 2006
- may enhance communication and collaboration between team members Silvaraman Nair & Wade, 2003



Other Purposes of Goal Setting

- To enhance patient autonomy
 - Empowers patients
Kirschner, 2005; Zimmerman, 1995
 - Greater follow through and satisfaction
Berquist & Jacket, 1993; Carlson, 1996
- To evaluate outcomes and meaningfully evaluate the success of a rehabilitation
Levack et al., 2006



"Write it down. Written goals have a way of transforming wishes into wants; cant's into cans; dreams into plans; and plans into reality. Don't just think it - ink it!"

-Author Unknown



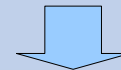
Toronto Rehabilitation Institute

- Canada's largest adult rehab service provider – serving > 16,000 people per year at its five sites
- Fully-affiliated with University of Toronto as specialized teaching hospital in adult rehab and complex continuing care
- Strong integration of both research and education to improve patient care



History of Goal Setting at Toronto Rehab

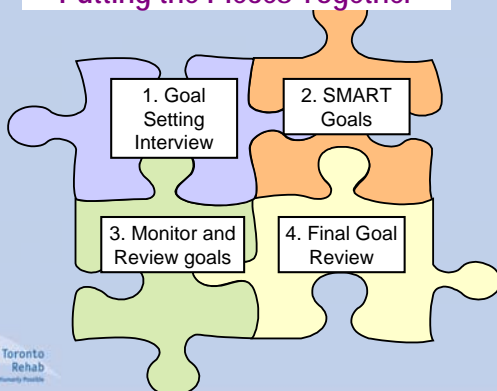
Various teams
Range of methods
Wide ranging expertise with goals



Consistent approach to goal setting
Consistent documentation and processes



Putting the Pieces Together



Goal Setting Interview

- Goal coordinator assigned
- Interview documented
- Goals, participation statements and satisfaction ratings documented
- Results shared with interprofessional team



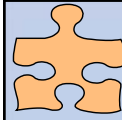
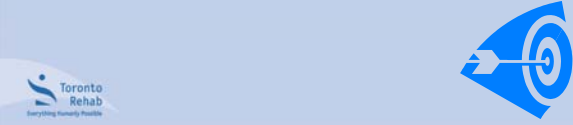
RESOURCES

- Goal Interview with key questions
- Goal guides (patient and staff)
- Samples



Patient Goals

- **Patient Goals** are specific activities a patient wants to do or an impairment s/he wants to improve (e.g. I want to walk, I want to be able to use my right hand, I want to go to the bathroom on my own, I want to be pain-free)



SMART Goals

- SMART goals and action plans developed (uni and interprofessional)
- Based on documented goal setting interview
- Satisfaction ratings documented
- Results shared with interprofessional team



RESOURCES

- Samples provided
- Documented cues
- Goal champions/ resource people



What is a SMART Goal?

S = Specific
M = Measurable
A = Achievable
R = Relevant
T = Timely



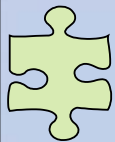
Patient's goal: "I want to go home"

Sample SMART Goals:

Joe will transfer to and from wheelchair and toilet independently by October 5, 2006.

Action:

OT, PT and Nursing: Facilitation of safe standing transfers using raised toilet seat with arms. Provide education for Joe and family regarding safe transfer practices.



Monitor and Review Goals

- Review goals with patient (are they still reflective of patient's current goals?)
- Gather satisfaction ratings
- Develop new SMART goals as appropriate
- Goals drive rounds and family conference discussions as well as progress documentation
- Goals guide framework for collaboration for each patient



Final Goal Review

- Goals reviewed with patient and satisfaction ratings obtained
- Final SMART goal status determined
- Goal collation (summary) form completed
- Goals recorded on discharge summary



But...is it really that easy?

- “While certainly desirable, goal setting may be a more complicated procedure than it has been portrayed”
Stiegert & Taylor, 2004
- “Agreeing that a problem is present does not imply that he or she wishes to do anything about it”
van der Broeck, 2005



But...is it really that easy?

- Various levels of staff comfort and expertise in goal setting activities – opportunity to build goal setting expertise across teams
- Variety of processes evolved – opportunity to enhance consistency
- Range of client satisfaction with goal setting – opportunity to improve goal setting practice
- Organizational and programmatic changes - opportunity to further integrate goal setting practices



Effective Dissemination of Information

- Target audiences should be identified and engaged early
- Messages should be clear, simple, action-oriented, and tailored based on what that audience wants to know
- Messengers should be people or organizations that are credible and influential
- Dissemination activities should be tailored to the preferences for receiving information of each target audience (Ex. face-to-face, active strategies)

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How to Develop a Message

- What should be transferred to decision makers (the message)?
- To whom should research knowledge be transferred (the target audience)?
- By whom should research knowledge be transferred (the messenger)?
- How should research knowledge be transferred (the Knowledge Translation process and support system)?
 - Use of multiple strategies (ex. small group work, champions)
- With what effect should research knowledge be transferred (evaluation)?

Lavis (2003)



Principles of Adult Learning

- Establish effective learning climate
- Involve learners in planning
- Involve learners in diagnosing own needs
- Encourage learners to formulate own objectives
- Encourage learners to identify resources/strategies
- Support learners to carry out plan
- Involve learners in evaluation



Common Elements of the Approaches

What? Who?

- Consideration of evidence/message/content
- Target audience

Where?

- Context (ex. Kitson, Harvey & McCormack, 1998)

How? When? How?

- Transfer strategies and facilitation
Ex. Identify needs and barriers (Grol & Wensing, 2004), use of champions (Fineout-Overholt, Levin, & Melnyk, 2004/2005)

With what effect?

- How is change evaluated?
Ex. deliverables identified at the outset

Plan for sustainability

- Ex. embed in existing structures and processes



Planning - Who? What?

- Needs assessment
 - Current level and desired
 - Preferred methods for dissemination
- Target audiences
 - 2 groups
 - Beginner and advanced education needs identified
- Identify potential areas for improvement
 - Ex. chart audit pre education



Planning - Understanding the Context

- Environmental and organizational changes
 - New staff
 - New model of nursing care delivery
 - Continuous professional development plan for all professions
 - Accreditation
- Feedback
 - Patient and family feedback
 - Staff educational needs assessment
 - Management very supportive



Planning – How?

- Adult learning principles
 - Ex. encourage learners to generate and share strategies using small group work
- Use of local champions
- Dissemination
 - Ex. active



Planning – With What Effect?

- Determine outcome measures
 - Ex. knowledge change
- Education evaluation
- Chart audit 3 month post education
- Results:
 - Increase in knowledge uptake as evidenced by pre and post tests
 - Very satisfied with education – presenters and format
 - Chart audit results pending



Staff Education – Planning for Sustainability

- Champions
- Job aids (ex. goal coordinator checklist)
- Aligning with existing structures and processes (ex. embed in programmatic orientation)
- Monitoring
- Expectation as part of role



Roles of Goal Champions

- Be the designated resource persons in the team
- Partner with frontline clinicians with less experience in goal setting to provide opportunities for shadowing and practice
- *Be there to provide support as role models!*



How champions provide support ...

- Provide consultation in the development of goal education curriculum and aids
- Participate in education sessions to guide small group discussions and completion of case studies
- Observe and support completion of goal setting interviews with novice goal setters
- Provide education and practice on goal documentation
- Provide positive and constructive feedback



*On a
personal
note...*



Thoughts and Future Directions ...

- Formalize structure to facilitate interprofessional short-term goal development and review
- Better support goal coordinator role through implementation of the new Care Delivery Model for Nursing



Starting your own Goal Planning

- Recommendations:
 - Needs assessment
 - Management/organizational support
 - Frontline Champions
 - Clearly articulated roles and responsibilities of all involved (team, goal coordinator role, etc.)
 - SWOT – contextualized to specifics
 - Evaluation and sustainability framework



Parting Words...

- Goal setting is a positive element in a rehabilitation program
- Take the time to do your homework and customize your program accordingly
- Ongoing evaluation and process improvement are critical to continued success in goal setting



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