



TOOL KIT

Community Care Version



FEBRUARY 2011

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About ReLATE|ReSPOND

Tips and Techniques for Enhancing Relationships between Clients, Families and the Health Care Team

The R.E.L.A.T.E. & R.E.S.P.O.N.D. program was developed by Patient Relations in Alberta Health Services, formerly Capital Health, in 2001. Redevelopment of the ReLATE|ReSPOND program for a provincewide initiative was undertaken in partnership between Alberta Health Services and the Health Quality Council of Alberta in 2007.

Content of the program is based on feedback from clients and their families about what they want from their health care providers. The acronyms were chosen to reflect key communications strategies and techniques proven to work in building positive relationships between clients/families and their health care providers. It is based on the premise that if health care providers ReLATE to clients and their families, they may not have to ReSPOND to a concern or complaint. The program is relevant to all staff, including frontline health care professionals and support staff as well as their managers.

- ReLATE provides tips for everyday communications strategies for positive client and family relations.
- When a concern or complaint is received, effective complaint handling at the point-of-care using ReSPOND techniques can prevent escalation and further enhance client-provider relations.

The Community Care and Acute Care Versions of ReLATE|ReSPOND have identical content. However, the Community Care version uses the term “client” while the Acute Care version uses the term “patient”.

R.E.L.A.T.E. & R.E.S.P.O.N.D. © 2001 Capital Health

The acronyms as used in this program have been copyrighted by the former Capital Health region (now Alberta Health Services).



Acknowledgements

The contribution of Mareika Purdon to redevelopment of the original Capital Health program materials for the province-wide initiative is gratefully acknowledged. She shared her experience in using the R.E.L.A.T.E. & R.E.S.P.O.N.D. materials and developed much of the original content in the Tool Kit.

Requests for tool kit materials (pocket cards, electronic files) and questions about the provincial ReLATE|ReSPOND initiative should be directed to:

Health Quality Council of Alberta

210, 811 – 14 Street NW
Calgary, Alberta T2N 2A4
Phone: 403.297.8162
info@hqca.ca
www.hqca.ca

Alberta Health Services (AHS) employees can access ReLATE|ReSPOND materials on the AHS intranet. Questions about ReLATE|ReSPOND within AHS should be directed to Patient Relations.



About the Tool Kit

This Tool Kit has been developed to assist you in planning a ReLATE|ReSPOND program and provides suggestions about how to use the materials effectively in different staff development situations. It also includes a description of all the program materials.

Section 1: provides suggestions about how to use the materials effectively in different staff development situations.

Section 2: provides a description of each of the materials contained in the tool kit. Pocket cards and electronic files of the program materials must be ordered from the HQCA. Alberta Health Services employees can also access tool kit materials from the Alberta Health Services intranet.

This version of the Tool Kit uses *client* language appropriate for community care facilities.



Section 2: Tips for Creating a Successful Program

1. Planning the Program

Here are some questions to consider when planning to deliver a ReLATE|ReSPOND program. If the in-service has been requested from a particular unit or staff group, discuss the needs of the group with the area manager or supervisor.

Who is the audience?

ReLATE|ReSPOND materials can be adapted for use with both frontline staff and managers, and health care professionals and support staff. Consider if they are new staff (e.g., orientation) or current staff. It may be necessary to tailor messages to the audience or develop cases for discussion that are relevant to that group.

How much time do they have?

ReLATE|ReSPOND materials can be adapted to short (e.g., 15 minute) or long (e.g., 30 to 60 minute) time frames.

Why is this program needed/has been requested?

Sometimes a general overview of ReLATE or ReSPOND will be sufficient (e.g., new staff orientation or introduction to ReLATE|ReSPOND with a particular staff group).

ReLATE|ReSPOND materials and content also can be adapted to target a current or emerging client relations issue in an area or with a particular staff group.

ReLATE|ReSPOND materials can be used to support longer skill-building workshops.

See below for suggestions on how to use ReLATE|ReSPOND materials in these different situations.

What are the hot spots or issues the staff are currently dealing with in terms of client relations?

This will help you determine topics to focus on as well as issues to be sensitive about.

Relating the general ReLATE and/or ReSPOND techniques to a current issue in the area can be a very powerful learning tool for staff because it makes the content directly relevant to their situation.

Where is the program taking place? Is technology available or even necessary?

ReLATE|ReSPOND materials can be adapted to informal (e.g., small discussion group in a staff room) and more formal (e.g., large group presentation in a conference room) settings.

Informal sit-down sessions in a staff room with the emphasis on discussion and sharing can be more effective than a formal presentation for many staff, particularly if the objective is to improve morale around current difficult issues or meeting the needs of challenging clients or families in the area. These programs don't require equipment, but handouts can be useful (e.g., pocket cards, reference handouts).

The PowerPoint slides are more suitable to larger group presentations in a more formal setting. You will require a laptop computer with Microsoft PowerPoint software loaded and an LCD projector. Ensure that the technology you require is available – and test it to make sure it works before the presentation begins!



2. Suggestions for Different Types of Programs

ReLATE|ReSPOND materials can be used in a number of different ways depending on the time available and the needs of the audience. As the time available increases, more materials can be used to stimulate and support discussion that helps staff reflect on communication strategies that work in challenging client relation situations. The facilitator can choose to use the ReLATE|ReSPOND materials that seem to best meet the needs of the audience and situation.

1. Orientation for new staff OR refresher/update for staff previously introduced to ReLATE|ReSPOND

Time: 15 to 30 minutes; formal presentation

Suggested materials:

- PowerPoint slide presentation
- Laptop computer
- LCD projector
- ReLATE|ReSPOND pocket cards

Comments:

- This is a very short presentation to provide new staff with basic knowledge of ReLATE|ReSPOND or provide a refresher of key ReLATE|ReSPOND principles for staff who have previously been introduced to the program.
- As new staff may feel overwhelmed at this stage, just provide them with the pocket cards and advise them that they will have access to other, more detailed presentations in the future.
- Another option for a refresher is to put the PowerPoint slides and speaker notes on the organization's Intranet for staff to review on their own time. The face-to-face presentation is strongly recommended for new staff orientation.

2. In-servicing of current staff to ReLATE|ReSPOND

Time: 30 to 45 minutes; formal presentation

Suggested materials:

- PowerPoint slide presentation
- Laptop computer
- LCD projector
- Pocket cards
- Handout: *Strategies for Relating to Clients and Families*

Comments:

- Used as part of a roll-out of ReLATE|ReSPOND through a facility.
- Can expand on the basic ReLATE|ReSPOND presentation script by leading a discussion about staff experiences with difficult clients/families and which ReLATE|ReSPOND techniques might have been helpful in dealing with those situations.
- It is not necessary to work through the material in the handout *Strategies for Relating to Clients and Families*. However this is a useful resource to leave with the staff for personal reflection after the presentation and reference for the next difficult situation they encounter.



2. Suggestions for Different Types of Programs (continued)

3. Team meetings or debriefings about current issues in the area

Time: 30 to 45 minutes; informal discussion

Suggested materials:

- Pocket card
- Handout: *Strategies for Relating to Clients and Families*

Comments:

- Prepare by finding out more about the issue in the area that is causing a conflict between staff and their clients/families.
- Consider specific ReLATE|ReSPOND strategies that staff can use to manage the conflict.
- Encourage staff to think about the client/family perspective in addition to their own feelings.
- Using the handout as a guide, encourage staff to identify strategies they think might work.
- It is not necessary to review all the material on the handout. Focus on identifying strategies that are most likely to be effective in this situation.

4. ReLATE|ReSPOND skill-building workshops

Time: 60 to 90 minutes; formal presentation with large and small group activities

Suggested materials:

- PowerPoint slide presentation
- Laptop computer
- LCD projector
- ReLATE|ReSPOND pocket cards
- Handout: *Strategies for Relating to Clients and Families*
- Handout/Discussion Guide: *Examining Your Attitudes*
- Handout/Discussion Guide: *What Do Clients/Families Want?*
- Handout/Discussion Guide: *What Do Complaining Clients/Families Want?*
- Handout/Discussion Guide: *The Best and the Worst*
- **Optional;** Discussion Guide: *Dealing with the Angry Person*

Comments:

- Go through selected handouts in detail, allowing time for discussion. Allow a minimum of 15 to 20 minutes for each discussion activity. Expand upon material reviewed at previous/shorter presentations as described above.
- Using the handouts as guides, encourage staff to identify strategies they think might work; encourage staff to discuss/share specific scenarios during which they have tried/will now try the strategies being discussed.
- Now that you have time, review all the material on the handouts. As staff share, focus on identifying strategies that are most likely to be effective in the situations being discussed.



3. Tips for a Successful Presentation

- Tip:** If you have access to client feedback data, try to bring examples of both positive (commendations) and negative (complaints) from clients. Try to bring copies of the commendations that you can read to the group – this will be very well received. Positive feedback is important!
- Tip:** Credibility of the speaker is important. It should be someone the staff can relate to who has had similar work experiences.
- Tip:** Use personal stories as examples for the different techniques or strategies.
- Tip:** Use humour when appropriate.
- Tip:** Reinforce that the ReLATE|ReSPOND techniques are based on feedback from clients and families about what they want from their health care providers.



Section 1: Materials

1. ReLATE Presentation Slides & Speaker Notes

Description: This presentation provides tips for everyday communication with clients to help build positive relationships.

The speaker notes provide suggestions for points to cover during the presentation. They do not have to be followed exactly; the presenter is encouraged to adapt his/her comments for the audience and training situation.

Suggestions for use:

- New staff orientation
- Introduction of current staff to ReLATE|ReSPOND
- Skill-building workshops
- Web-based access for staff review as part of a refresher or update

Presentation file: Com ReLATE 0211.ppt
Speaker notes file: Com ReLATE Slide Notes 0211.pdf



Section 1: Materials

2. ReSPOND Presentation Slides & Speaker Notes

Description: This presentation provides tips for handling the concerns of clients and families. Concerns are best handled as close to the front line as possible to prevent them from escalating.

The speaker notes provide suggestions for points to cover during the presentation. They do not have to be followed exactly; the presenter is encouraged to adapt his/her comments for the audience and training situation.

Suggestions for use:

- New staff orientation
- Introduction of current staff to ReLATE|ReSPOND
- Skill-building workshops
- Web-based access for staff review as part of a refresher or update

Presentation file: Com ReSPOND 0211.ppt
Speaker notes file: Com ReSPOND Slide Notes 0211.pdf

The logo features a blue speech bubble with a white exclamation mark inside, positioned above the text "ReLATE" in blue and "ReSPOND" in green.

R.E.S.P.O.N.D.

Handling the Concerns of Clients and Families

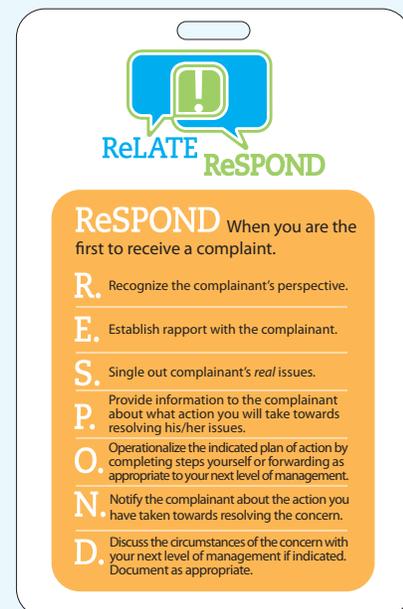
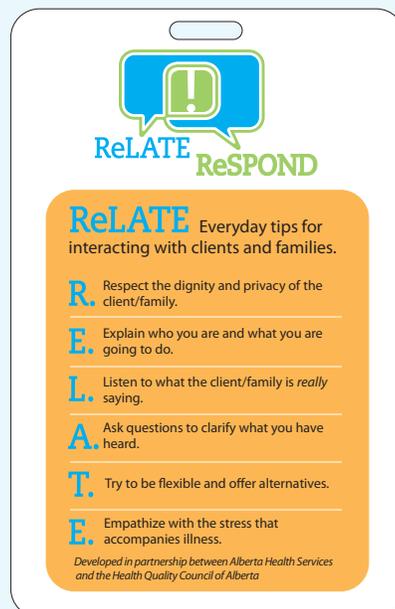
A vertical strip of four stylized faces in various colors (orange, green, blue, red) on a green background.A photograph showing a caregiver in a white coat sitting on a couch and talking to an elderly couple. The caregiver is holding a clipboard and looking at the couple.

3. Pocket Card

Description: 2.75" x 4.25" PVC card with ReLATE acronym on one side and ReSPOND acronym on the other side. Card has a punched slot to enable use on a lanyard.

- Suggestions for use:**
- New staff orientation – give to all staff in lieu of a handout
 - Introduction of current staff to ReLATE|ReSPOND
 - Staff in-service presentations on ReLATE|ReSPOND
 - Team meetings/debriefing
 - Skill-building workshops

Availability Must be ordered from the HQCA by phone: 403.297.8162 or e-mail: info@hqca.ca.
Order at least two weeks in advance of when they are needed to ensure timely delivery. Please specify the number of pocket cards required and the name and address of the person to whom they should be sent.



4. ReLATE Poster

Description: 8.5" x 11" poster with ReLATE acronym explained

- Suggestions for use:**
- Post in staff rooms or other non-public areas frequently used by staff (e.g., charting room)
 - Put in communication books or other staff communication tools

File name: ReLATE poster.pdf
ReLATE poster BLK. pdf

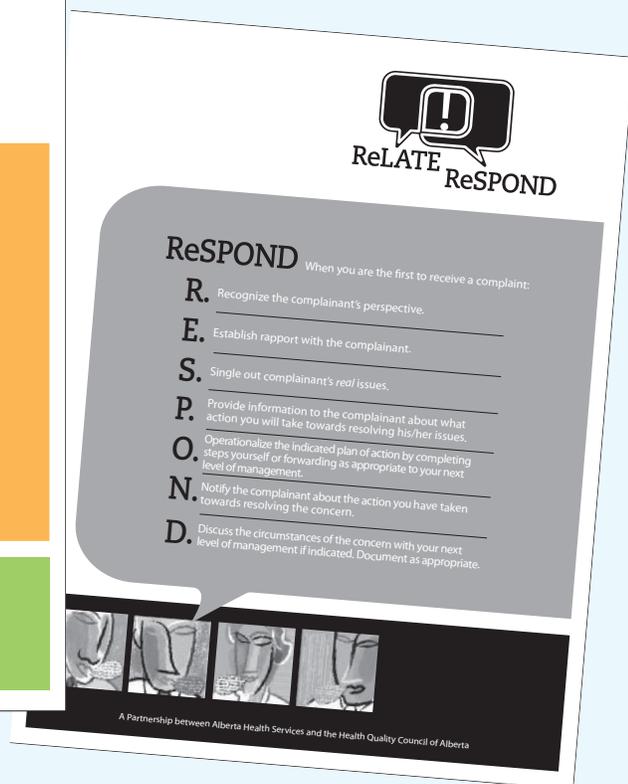
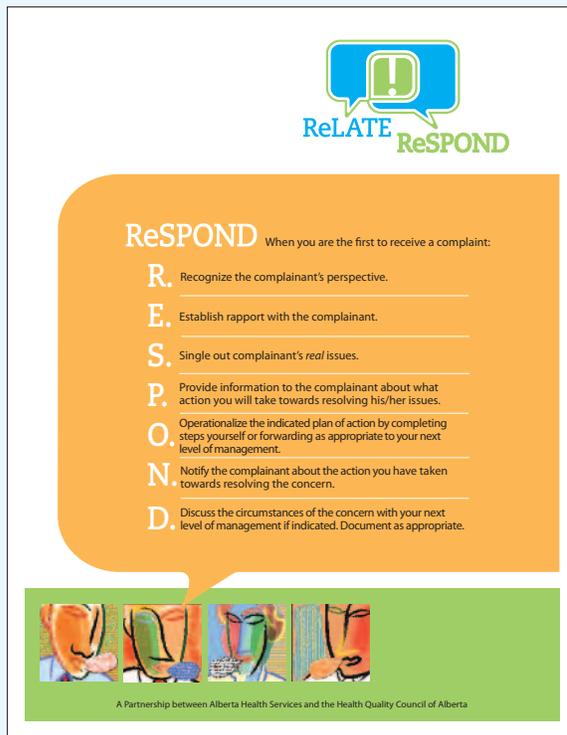


5. ReSPOND Poster

Description: 8.5" x 11" poster with ReSPOND acronym explained

- Suggestions for use:**
- Post in staff rooms or other non-public areas frequently used by staff (e.g., charting room)
 - Put in communication books or other staff communication tools

File name: ReSPOND poster.pdf
ReSPOND poster BLK. pdf



6. Upcoming In-service Poster

Description: 8.5" x 11" poster with space to enter date, time and location of an upcoming ReLATE|ReSPOND in-service program

- Suggestions for use:**
- Fill in date, time and location of an upcoming ReLATE|ReSPOND program
 - Post in staff rooms or other non-public areas frequently used by staff (e.g., charting room)
 - Put in communication books or other staff communication tools

File name: In-service poster.pdf
In-service poster BLK. pdf



7. Handout: Strategies for Relating to Clients and Families

Description: Four-page handout describing basic strategies for establishing positive client/family relations

Includes tips for dealing with the angry person and stress busters to help staff cope with difficult situations

- Suggestions for use:**
- Print double-sided on 8.5" x 11" paper
 - Handout for a ReLATE|ReSPOND skill-building workshop
 - Handout as part of a team meeting
 - May be used to accompany the video *Through the Patient's Eyes*

Optional resources: Video/DVD (22 minutes) *Through the Patient's Eyes*. Produced by the Picker Institute, Inc. www.pickerinstitute.org

The Picker Institute has identified seven dimensions of care that are important to clients and their families. The video *Through the Patient's Eyes* provides valuable insight for health care providers into what clients think and experience during a hospital stay related to each of the seven dimensions of care.

A video focused on the outpatient experience is also available: *Through the Patient's Eyes – The Ambulatory Care Experience*.

File name: Strategies Handout.pdf

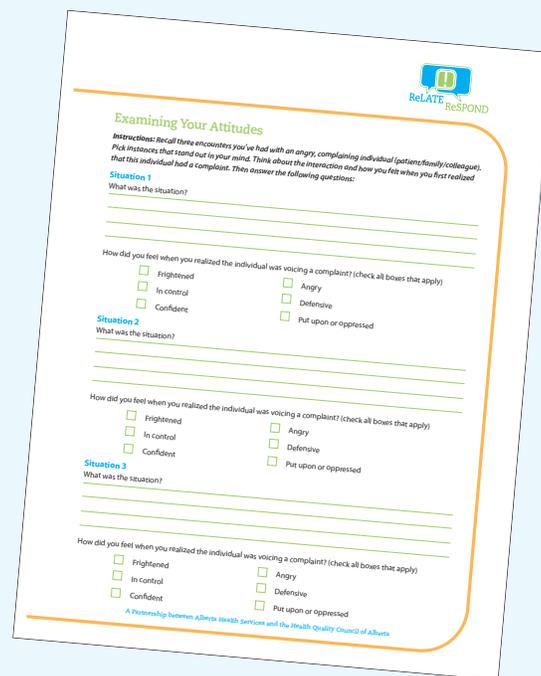


8. Handout/Discussion Guide: Examining Your Attitudes

Description: Two-page handout to guide discussion about personal attitudes to and experiences with handling angry or complaining individuals

- Suggestions for use:**
- Print double-sided on 8.5" x 11" paper
 - Handout to accompany a ReLATE|ReSPOND skill-building workshop

File name: Examining Attitudes.pdf

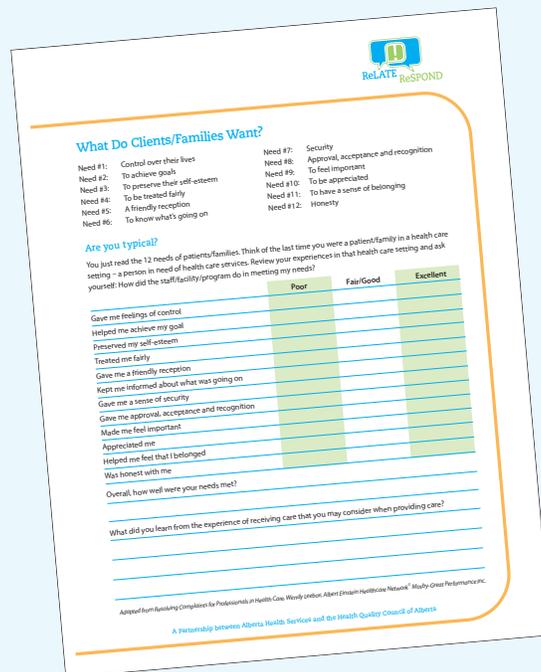



9. Handout/Discussion Guide: What Do Clients/Families Want?

Description: One-page handout to guide discussion about what staff can do to meet the needs of clients or family members based on their personal experiences as a user of the health care system

- Suggestions for use:**
- Print double-sided on 8.5" x 11" paper
 - Handout to accompany a ReLATE|ReSPOND skill-building workshop

File name: Client Wants Handout.pdf



What Do Clients/Families Want?

Need #1: Control over their lives
 Need #2: To achieve goals
 Need #3: To preserve their self-esteem
 Need #4: To be treated fairly
 Need #5: A friendly reception
 Need #6: To know what's going on

Need #7: Security
 Need #8: Approval, acceptance and recognition
 Need #9: To feel important
 Need #10: To be appreciated
 Need #11: To have a sense of belonging
 Need #12: Honesty

Are you typical?
 You just read the 12 needs of patients/families. Think of the last time you were a patient/family in a health care setting – a service in need of health care services. Review your experiences in that health care setting and ask yourself: How did the staff/facility/program do in meeting my needs?

	Poor	Fair/Good	Excellent
Gave me feelings of control			
Helped me achieve my goal			
Preserved my self-esteem			
Treated me fairly			
Gave me a friendly reception			
Kept me informed about what was going on			
Gave me a sense of security			
Gave me approval, acceptance and recognition			
Made me feel important			
Appreciated me			
Helped me feel that I belonged			
Was honest with me			
Overall, how well were your needs met?			

What did you learn from the experience of receiving care that you may consider when providing care?

Adapted from Mandatory Compliance for Professionals in Health Care, Wendy Lambert, Alberta Employment/Institutions Relations, Many Great Performances Inc.
 A Partnership between Alberta Health Services and the Health Quality Council of Alberta

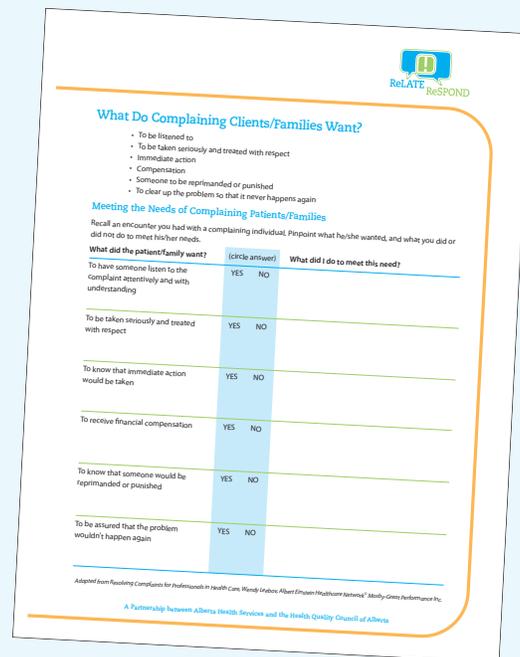


10. Handout/Discussion Guide: What Do Complaining Clients/Families Want?

Description: One-page handout to guide discussion about what staff can do to meet the needs of complaining clients or family members based on their personal experiences with complaining clients

- Suggestions for use:**
- Print double-sided on 8.5" x 11" paper
 - Handout to accompany a ReLATE|ReSPOND skill-building workshop

File name: Complaining Client Wants.pdf



What Do Complaining Clients/Families Want?

- To be listened to
- To be taken seriously and treated with respect
- Immediate action
- Compensation
- Someone to be reprimanded or punished
- To clear up the problem so that it never happens again

Meeting the Needs of Complaining Patients/Families

Recall an encounter you had with a complaining individual. Pinpoint what he/she wanted, and what you did or did not do to meet his/her needs.

What did the patient/family want?	(circle answer)	What did I do to meet this need?
	YES	NO
To have someone listen to the complaint attentively and with understanding		
To be taken seriously and treated with respect		
To know that immediate action would be taken		
To receive financial compensation		
To know that someone would be reprimanded or punished		
To be assured that the problem wouldn't happen again		

Adapted from: Feedback Complaints for Improvement in Health Care, Wendy Arbour, Albert Einstein Healthcare Network, Identity Crisis Performance Inc.
A Partnership between Alberta Health Services and the Health Quality Council of Alberta



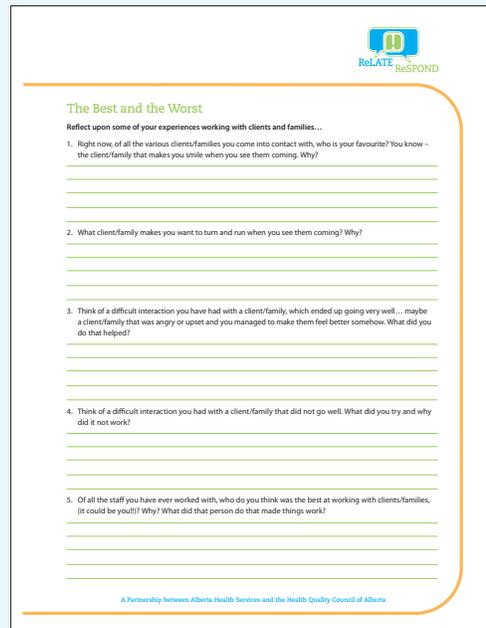
11. Handout/Discussion Guide: The Best and the Worst

Description: One-page handout to guide discussion about staff experiences in dealing with clients and techniques that seemed to help or hinder the situation

Suggestions for use:

- Print double-sided on 8.5" x 11" paper
- Handout to accompany a ReLATE|ReSPOND skill-building workshop

File name: Best Worst Handout.pdf




ReLATE ReSPOND

The Best and the Worst

Reflect upon some of your experiences working with clients and families...

1. Right now, of all the various clients/families you come into contact with, who is your favourite? You know – the client/family that makes you smile when you see them coming. Why?

2. What client/family makes you want to turn and run when you see them coming? Why?

3. Think of a difficult interaction you have had with a client/family, which ended up going very well... maybe a client/family that was angry or upset and you managed to make them feel better somehow. What did you do that helped?

4. Think of a difficult interaction you had with a client/family that did not go well. What did you try and why did it not work?

5. Of all the staff you have ever worked with, who do you think was the best at working with clients/families, (it could be you!!!) Why? What did that person do that made things work?

A Partnership between Alberta Health Services and the Health Quality Council of Alberta



