

Respecting Client Wishes: Compliance with Statutory Obligations & Advance Care Planning Draft Project Charter (June 24, 2008)

Project Name	Respecting client wishes: Compliance with Statutory Obligations & Advance Care Planning Phase One: Focus on Compliance with Statutory Obligations Phase Two: Focus on Advance Care Planning
Project Sponsor	Dr. Heather Manson, VP VCH Dr. David Ostrow, VP VCH, Dr. Patrick O'Connor, VP, VCH David Byers, Providence Health Care
Project Leadership Team	Darren Kopetsky Shannon Berg Lynda McCloy Cheryl Joliffe Camille Ciarniello Pat Porterfield Amanda Brown
Project Goal	Phase One: To ensure that VCH/Providence policies, procedures & practices are in compliance with the new 2007 legislative changes related to client consent, adult guardianship, and advance care planning.
Anticipated Completion Date	Phase One: Twelve Month project: May 2008—April 2009

Project Purpose & Background

Problem Definition

- New provincial legislation, Bills 26 & 29, passed in 2007 will have significant impact in terms of resources and statutory obligations for Health Authorities, health care providers & their clients
 - Bill 26, *The Health Statutes Amendment Act* repeals and replaces unproclaimed Part 3 of the *Health Care Consent and Care Facility (Admission) Act*, providing a new processes and steps for obtaining consent for admission to a facility, and determination of capability to do so. Health Authorities will be expected to have systems in place to deal with assessments for incapable patients according to regulations and patients will have legislated rights for annual reassessments.
 - Bill 29, *The Adult Guardianship and Planning Statutes Amendment Act* repeals and replaces the *Patients Property Act* and unproclaimed Part 2 of the *Adult Guardianship Act* in addition to amending various "planning statutes" and introducing a new planning instrument - Advance Directives. Statutory Property Guardianship is obtained through Health Authority Designates issuing a certificate based on assessments completed in accordance to Regulation and Practice Guidelines. Patients have increased safeguards for their rights, including that of a second assessment and annual reassessment. The Health Authority Designate is responsible to insure regulatory compliance.

- Although advance care planning has been identified as best practice for a number of client populations, Vancouver Coastal Health (in conjunction with Providence Health) does not have a regional approach to ensure clients' values, wishes & beliefs in regard to their health care are identified, recorded and honored, regardless of setting. The new legislation provides for changes in, and additions to, the existing planning tools for health and financial advance planning. If advance planning tools are encouraged and promoted appropriately while adults are capable, there will be a decreased reliance on the statutory substitute decision-making schemes, for which Health Authorities are primarily responsible.

Project Objectives

- To support the practice changes required to adhere to the legislative changes in substitute decision-making, assessment of capability & admission to care facilities through the provision of education and resource materials
- To develop or revise organizational systems so that care wishes of individuals are respected by ensuring that health care providers are aware of wishes as the client interfaces with care settings throughout the health care network
- To support health care providers wishing to facilitate clients' advance care planning through the provision of information, resources and tools which conform to statutory provisions and best practice

Project Scope

- Phase one project: May 2008-April 2009
- Focus on preparation for changes in legislation, anticipated in Feb 2009
- Regional: Vancouver Coastal Health and Providence partners in initiative
- Collaboration with provincial work groups formed to support legislative changes
- Target population is all capable adults and substitute decision-makers interacting with VCH, including those from other Health Authorities who use VCH services

Project Benefits

- VCH and PHC compliance with the legislation
- Greater confidence that health care is provided consistent with clients' wishes
- Regional approach will promote continuity of care for client & family, as they transition between sites/HSDAs/ agencies
- Efficiencies gained by working regionally and provincially
- Understanding and ability to plan for the significant resource implications for health care providers

Organizational Impact

Impacts of proceeding with the project	Impacts of <u>not</u> proceeding with the project
Understanding of legislative changes & Compliance with legislation throughout region	Non-compliance with legislation—at risk for some legal challenges and many complaints
Identification of resources required for compliance with statutory substitute decision-making including expanded definition of Qualified Health Care Provider for determining incapability.	Misunderstanding and inappropriate use of tools that seriously impact patient autonomy and may put the patient, the organization and the employee at risk.
Information & resources available for health care providers & public about health care consent legislation	Confusion as to health care consent procedures and frustration on part of providers & public
Supporting advance care planning in practice initiatives throughout the region, for example, chronic disease management models	Continued unstandardized approaches to advance care planning which result in lack of identification of and respect for clients' values and wishes

Project Risk			
Risk	Impact	Probability (High, Medium, Low)	Risk Mitigation Strategy
Failure to secure ongoing funding	High	High	Need to secure adequate funds; engage organization in recognizing urgency of project

Timeline for project not met, organization not prepared and unable to manage workload when legislation proclaimed	High	Medium	Focus on critical elements of success; need SET & stakeholder engagement
Difficulty gaining consensus to recommended approaches and resources	High	Medium	Working groups established to represent key stake holders and project team to coordinate working groups
Organization over-whelmed with activity/change initiatives and difficult to engage health care providers in educational initiatives	High	Medium	Support of executive sponsors and SET Ensure education is clear, timely & concise
Pace at which external partners are proceeding may impede progress at regional level (Attorney General's office is the provincial lead for new regulations)	High	Medium	Timing of initiative important; need to implement at the right time
Unable to sustain knowledge and skills of health care providers without dedicated support	High	Medium	Development of education materials and resources Development of Phase Two Plans to Enable Health Care Providers to support advance care planning

Major Milestones	
Milestone	Target Date
Develop project charter and circulate to key internal & external stakeholders in the organization	April 2008
Identify working group membership	June 2008
Regional Forum to inform VCH of impact of legislation and initiate working groups	July 2008
Working group orientation and develop workplans	August 2008
Working group plans to be presented/validated among broad stakeholder group	January 2009

Refine, confirm, and implement policies/systems/tools/	January -April 2009
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Project Team *(Roles and Responsibilities, Appendix I)*

Member	Role
Darren Kopetsky	Project Team member
Shannon Berg	Project Team member
Cheryl Joliffe	Project Team member
Lynda McCloy	Project Team member
Amanda Brown	Project Team member
Dr. Martha Donnelly	Project Team member
Camille Ciarniello	Project Team member
Pat Porterfield	Project Team member

Reporting Relationships

Project team will report to SET via the Executive Sponsors

Project Deliverables

- Policies, procedures and educational materials to support VCH/Providence compliance with legislation
- Plan for Phase Two: Advance Care Planning

Appendix I Stakeholder Consultation

This regional approach requires coordination from multiple sectors and a comprehensive communication plan to ensure awareness, connectedness, and consistency in policies and practice.

Proposed Stakeholder Consultation and subsequent participation in working groups as required:

- Public Guardian & Trustee
- Legal services
- Ethics committee
- Professional practice
- Community Engagement
- Communications
- Learning and Development
- Operational Directors representing community & acute care
- Clinicians in primary, community (residential), and acute care.
- Networks and CoC, particularly in the areas of Seniors, Palliative Care and Chronic Disease Management.
- Information management/information systems (IMIS)
- Health Records
- Ministry of Health
- Public representation
- Nidus Personal Planning Resource Centre
- Centre for Elder Law
- Others to be determined

Appendix 2 Working Group Structure

Working group leads will be members of the Project Team

1. Advance Care Plans - Receipt and Management

Lead: Darren Kopetsky

Mandate:

To develop or revise organizational systems for the identification and communication among the health care team of advance care plans (formal and informal) and to develop and deliver an initial and sustainable educational approach and resource to support practice.

Deliverable(s):

- Policy, System and process for receipt and communication among health care providers of advance planning documents generally, and clients' directions to review and update those documents in our records;
- To develop and make accessible a practice guide resource
- To develop and deliver an initial and sustainable educational approach to support practice

Key linkages:

- Advance Care Planning – Encouragement and Development working group
- Admitting
- IMIS - Clinical Information Systems and Health Records
- Professional Practice (Medicine, Nursing, and Allied Health)

2. Advance Care Planning – Encouragement and Development –

Lead: Pat Porterfield

Mandate:

To support providers who seek to encourage clients to develop formal or informal advance care plans by providing guidance with the alternatives and ensuring attention to statutory provisions

Deliverable(s):

- Participation in regulatory Advance Directive form design working group
- Development of guidance for clients in the types and criteria of advance directives
- Development of guidance for providers in encouraging advance care planning, in particular identification of key health care provider groups and target populations for whom advance care planning has significant benefit in the delivery of their health care
- Develop a plan for the on-going support of advance care planning within the region (VCH & Providence)—Phase Two of initiative

Key linkages:

- A-G's regulatory Advance Directive form design working group
- Clinical groups that are seeking assistance
- Representation Agreement Resource Centre
- VCH Community Engagement

3. Statutory substitute decision making, staff and MD resource–

Lead: Amanda Brown

Mandate:

- Identification of changes from current practice (see attached guide), as well as a guide to future practice to ensure an escalating approach beginning with the least intrusive / most effective means of support ;
- To develop and deliver an initial and sustainable educational approach and resource to support practice

Deliverable(s):

- New resource guide
- “What has changed” change management resource
- To develop and make accessible a practice guide resource
- To develop and deliver an initial and sustainable educational approach to support practice

Key linkages:

- PGT
- Professional Practice (Medicine, Nursing, and Allied Health)

4. Capability Assessments –

Lead: Cheryl Jolliffe and Dr. Martha Donnelly

Mandate:

- Identification of changes from current practice, advocacy with external agencies to ensure fairness and sustainability, and to develop and deliver an initial and sustainable educational approach and resource to support practice

Deliverable(s):

- New resource guide
- “What has changed” change management resource
- To develop and make accessible a practice guide resource
- To develop and deliver an initial and sustainable educational approach to support practice

Key linkages:

- PGT
- Professional Practice (Medicine, Nursing, and Allied Health)
- MSP

5. Care Facility Admission provisions –

Lead: Shannon Berg

Mandate:

- Identification of changes from current practice, and to develop and deliver an initial and sustainable educational approach and resource to support practice

Deliverable(s):

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| <ul style="list-style-type: none">- New resource guide- “What has changed” change management resource- To develop and make accessible a practice guide resource- To develop and deliver an initial and sustainable educational approach to support practice |
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Key linkages:

- Community Care leaders – direct and contracted
- VCH / PHC discharge planning leaders
- Professional Practice (Medicine, Nursing, and Allied Health)

Appendix 3

Roles and Responsibilities of Project Team Members

Project Leadership Team

- Responsible for the planning and implementation of the project
- Develop project team
- Ensure development of project charter
 - ◆ Set a clear goal
 - ◆ Determine project objectives/deliverables, scope and accountability
 - ◆ Identify risks and plan risk mitigation strategies
 - ◆ Identify tasks, checkpoints and milestones
 - ◆ Determine relationship and logical order of workplan
 - ◆ Estimate resource needs
 - ◆ Communicate – picture of project schedule, charts, etc.
- Manage team and work
- Monitor activities against events, checkpoints and milestones
- Regular status reports
- Ensures documentation of plans, outcomes and accomplishments

Director (Executive) Sponsor

- Approve project charter, ensure fit with organizational needs priorities
- Obtain resources, approvals, etc. for project activities and outputs that are within the scope of the project
- Communicate any changes in organizational needs to project manager
- Monitor that project is on schedule and that milestones are met
- Support to project manager and project
- Coordination of project with other projects, activities etc.
- Reports progress to Steering Committee.

Project Team Participants

- Commitment to attendance and active participation in project
- Commitment to support of project goals rather than individual program/discipline issues
- Completion of assigned project work
- Communicate with key stakeholders

Project Planners

- Provide support, advice, assistance in setting up project
- Assists in drafting project charter, identifying measurable objectives and providing initial timeline/workplan
- Provides background documents, pertinent data to project
- Conducts project evaluation including logic model development, research, identification of data collection methodologies and analysis.

Project Support

- Provide support, advice, assistance in setting up project
- Assists in drafting of project documents
- Assists project manager in preparing for project team meetings
- Provides background documents, pertinent data to project
- Ensures project documentation, schedules, etc. are completed

- Provides project manager with information related to project activities milestones budget, etc. including variations from schedule
- Assists with status reports

HR/Finance

- Provide information, advice related to their specific area of expertise in a timely manner
- Develop understanding of project charter and goals and advice on any HR/Finance issues arising
- Support goals of project
- Attend meetings as required/requested

Communication

- Develop understanding of project charter and goals and advise on any communication issues arising
- Support goals of project
- Provide assistance in development of communication strategies and plan
- Attend meetings as required/requested

Community Engagement

- Provide information and advice related to engagement and/or partnership strategies and mechanisms
- Develop community and stakeholder engagement plans
- Conduct engagement activities, or where necessary, assist in securing resources to do so
- Document findings, assist staff in incorporating input into planning, and create mechanisms for informing participants of how their input was used in the decision making process