

## WORKSHEET FOR DEVELOPING SAFE PATIENT HANDLING GOALS - 2010-2011

Your name: \_\_\_\_\_

Your employer: \_\_\_\_\_

Date of completion: \_\_\_\_\_

**How to use this worksheet:** Step 1: Complete this tool as a group to focus efforts and define goals for your Safe Patient Handling Committee. Step 2: these goals developed from this worksheet will be used to complete the 60-Day Follow up accountability form.

**Step 1: Determine what you want to accomplish. Write down three goals that will improve your Safe Patient Handling Program by completing the following sentences. (Examples: We want to prevent patient and employee injuries. We want co-workers to understand the importance of reporting incidents. We want better support from the Facilities Department regarding equipment returned to the floor. We want a better procedure for ordering and delivery of bariatric equipment for patients-of-size.)**

- a) We want to accomplish \_\_\_\_\_.
- b) We want co-workers to \_\_\_\_\_.
- c) We want the facility to \_\_\_\_\_.

**Step 2: Determine when you want it accomplished. Taking the three goals (above) to the next level, write three specific and measurable program objectives that the committee can attain. Then, determine when you can realistically expect the objectives to be completed. (Examples: we want to reduce employee injuries from patient transfers by 10%. We will create a training module and competency for all patient care employees regarding use of equipment by December 2010.)**

- a) \_\_\_\_\_ When? \_\_\_\_\_
- b) \_\_\_\_\_ When? \_\_\_\_\_
- c) \_\_\_\_\_ When? \_\_\_\_\_

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**Step 3:** Determine who will be involved. Identify Target Group/s or stakeholders in your facility for participation in program interventions and who will be served by the Safe Patient Handling Committee. Who do you want to target during the year? Be sure to be able to answer the question of “Why?” a particular group should be targeted. For instance, if you find that the greatest need is training for nursing assistants, list them as a target group to participate in reducing employee injuries from patient transfers.

- a) \_\_\_\_\_ Why? \_\_\_\_\_
- b) \_\_\_\_\_ Why? \_\_\_\_\_
- c) \_\_\_\_\_ Why? \_\_\_\_\_

**Step 4:** Prioritize the resources, strategies or interventions that you think will most effectively help you, your committee or your facility achieve goals listed in Step 1 (above). Below is a sample list of some commonly used strategies or interventions.

- ▶ Experts in safe patient handling (examples: vendor representatives, trainers, etc)
- ▶ “After Action” Review or “Just in Time” review
- ▶ Review policies and procedures (examples: the Patient Handling & Movement Policy, Fall Protection Program)
- ▶ Assessments, Care Plans & Algorithms
- ▶ Ergonomic Assessments of Patient Care Areas
- ▶ New Patient Handling Equipment (specify)
- ▶ Providing more feedback and information to staff
- ▶ Create more focused education/training
- ▶ Perform Root Cause Analyses within 72 hours of injuries

| Resource/Strategy/Intervention | Detailed Description | Target Audience | Name of Person Responsible for Assignment & Target Date |
|--------------------------------|----------------------|-----------------|---|
|                                |                      |                 |   |
|                                |                      |                 |   |

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**Step 5: Target Marketing Plan** – You now have at least three goals, a measurement or due date for the goals, target groups or people in your hospital that will benefit or be affected by your three goals. You have also determined who will be responsible for each goal and you have a target date to accomplish the goal. **In Step 5**, you will get more specific about identifying the stakeholders and the reasons why they will benefit so you can convince them to participate. To best accomplish its goals, you and your committee must understand how to benefit the stakeholders, how to motivate them to help themselves and how to maintain their support until the goal is accomplished. The shaded headings are typical motivators for stakeholders.

| Examples of Stakeholder Groups | Save money | Decrease Injury incidents | Decrease Injury Severity | Decrease Turnover & Retain employees | Become IMPORTANT or Recognized | Decrease work load | Increase Safety | Increase satisfaction |
|--------------------------------|------------|---------------------------|--------------------------|--------------------------------------|--------------------------------|--------------------|-----------------|-----------------------|
| Staff who provide patient care |            |                           |                          |                                      |                                |                    |                 |                       |
| Managers                       |            |                           |                          |                                      |                                |                    |                 |                       |
| Administration                 |            |                           |                          |                                      |                                |                    |                 |                       |
| Staff Development/ Educators   |            |                           |                          |                                      |                                |                    |                 |                       |

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|--------------------|--|--|--|--|--|--|--|--|
| Risk Management    |  |  |  |  |  |  |  |  |
| Patients           |  |  |  |  |  |  |  |  |
| Family of Patients |  |  |  |  |  |  |  |  |
|                    |  |  |  |  |  |  |  |  |

**Step 6: Identify potential barriers to implementation.** You must be realistic about potential obstacles or threats to achieving your goals. The obstacles listed (employees, patients, family member, etc) are only examples. Typically obstacles to change come from staff, patients, and people within the organization. This is the time to be realistic about what you must deal with through the year.

|                    | <b>Potential Barriers</b> | <b>Strategies to Overcome Barriers</b> |
|--------------------|---------------------------|--|
| Staff or Employees |                           |  |
|                    |                           |  |
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|                                      |  |  |
|--------------------------------------|--|--|
| <b>Patients/Family</b>               |  |  |
|                                      |  |  |
|                                      |  |  |
|                                      |  |  |
|                                      |  |  |
| <b>From Within the Organization</b>  |  |  |
|                                      |  |  |
|                                      |  |  |
|                                      |  |  |
|                                      |  |  |
| <b>From Outside the Organization</b> |  |  |
|                                      |  |  |
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**Step 7:** Identify actual people who will help your or your committee achieve its goals. Remember to think beyond your work group, these “helpers” could be at the staff, patient, and other organization levels, like members of a Board or Foundation.

|                     | <b>Facilitators/Helpers</b> | <b>Strategies to Aid Facilitators/Helpers</b> |
|---------------------|-----------------------------|---|
| <b>Staff</b>        |                             |   |
|                     |                             |   |
|                     |                             |   |
|                     |                             |   |
|                     |                             |   |
| <b>Patient</b>      |                             |   |
|                     |                             |   |
|                     |                             |   |
|                     |                             |   |
|                     |                             |   |
| <b>Organization</b> |                             |   |
|                     |                             |   |
|                     |                             |   |
|                     |                             |   |
|                     |                             |   |

**Step 8:** Be specific about how you or your committee will evaluate its success. How will the committees or you know when the goals are achieved? How often will you or your committee review goals, interventions, etc., to determine if the goals will be reached by the target date?

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**Step 9:** What strategies will you use to maintain the interventions or success over time?

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**Step 10:** Taking the results of the first nine questions, go to the next page to list and assign the tasks that need to be completed within the next 60 days. **This will be your 60 Day Review.**

## 60 Day Goal and Task List Review

How to use this form: Experts in achievement have told us for years that the best way to achieve goals is to create a time to review progress. Many people find that enthusiasm for work is the highest when in the classroom, workshop or meeting. The easiest way to stay “on task” and accomplish your goals is to have a mentor check your progress. In 60 days, you may realize that you have the wrong goal, the wrong people involved or the wrong strategy. The best time to make corrections is the 60 Day Review. Use the results from the worksheet (pages 1 through 8) to summarize your goals and tasks. Then, sign the form, date it and fill in the review time, 60 days ahead. This page will be the focus to begin your achievement.

Your goals:

- 1.
- 2.
- 3.

Your people:

- A. \_\_\_\_\_
- B. \_\_\_\_\_
- C. \_\_\_\_\_
- D. \_\_\_\_\_
- E. \_\_\_\_\_

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Tasks to accomplish in the next 60 days:

A.

B.

C.

D.

E.

Name: \_\_\_\_\_

Today's date: \_\_\_\_\_

60 Days from today (write a date) \_\_\_\_\_