Resident and Family Engagement Checklist

**Purpose:** To provide leaders and staff a checklist to help plan, implement, and evaluate resident and family engagement in safety projects in a long-term care facility.

**Who should use this tool?** Leaders (long-term care facility administrator, director of nursing, medical director, etc.) and any staff who provide care or services can use this tool to guide their efforts to engage residents and family members.

**How should you use this tool?** Review each task to plan, implement, and enhance resident engagement efforts. Add to this list any activities already underway to support engagement of residents and family in safety efforts in your facility. Highlighted text can be edited with facility-specific project names and goals.

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| **Complete**  **✓** | **Opportunities To Engage Residents and Family** | **Responsible Party** | **Notes** |
|  | Assign a leader to oversee the facility’s efforts to evaluate and improve resident engagement practices. |  |  |
|  | Use an assessment tool to evaluate current performance. This can also include a preference collection tool that helps your facility understand what residents desire for their care. |  |  |
|  | Evaluate the ways you currently listen to residents and families (focus groups, learning circles, resident councils, etc.). Identify ways to increase the number of opportunities to solicit input. |  |  |
|  | Conduct town hall meetings, “safety” care conferences, and individual meetings with residents and family members to specifically focus on safety concerns and share efforts to reduce catheter-associated urinary tract infection (CAUTI). |  |  |
|  | Communicate to residents and family that CAUTI reduction is a facilitywide priority. |  |  |
|  | Provide opportunities to educate residents and family members concerning the AHRQ Safety Program for Long-Term Care: HAIs/CAUTI. |  |  |
| **Complete**  **✓** | **Opportunities To Engage Residents and Family** | **Responsible Party** | **Notes** |
|  | Invite residents and families to present at staff orientations and in-service programs. Examples of presentation topics can include resident stories involving safety issues, examples of how residents and families want to be engaged in safety work, and the resident and family perspectives concerning the safety program. |  |  |
|  | Explore the facility through the eyes of residents and their families by doing a “walk-about” with residents and families. Focus on safety efforts, behaviors, and skills. |  |  |
|  | Include residents and family members on the teams that are developing the plans to achieve the goal of CAUTI reduction. Ask residents to help define what successful resident/family engagement will look like. |  |  |
|  | Provide updates on progress and monitoring during resident council meetings. Make safety reports a standard agenda item for council meetings. |  |  |
|  | Involve resident leaders in learning from defects discussions. |  |  |
|  | Develop a method to track resident input and provide feedback on status of response to needs, concerns, or opportunities for improvement. Ask about and listen to their needs and concerns, especially related to safety. |  |  |
|  | Include residents/family in team celebrations. |  |  |
|  | Post stories of resident/family engagement in facility newsletter and provide opportunities for residents or family members to share their success stories with management and other teams. |  |  |
|  | Include resident advisers/ombudsmen in safety rounds. |  |  |
|  | Develop resident adviser program. |  |  |