

NSW Alliance of Divisions of General Practice Sponsored Pilot Project

Self-management tools for Practice Nurses and Their Patients

Pilot Project Evaluation June 2008

Dr Sue Curtis, CAHRI Principal, ORTRAN Consulting, Self-Management Solutions Mr Owen Curtis, FAAESS University of Wollongong, ORTRAN Self-Management Solutions, Manager, Continuing Professional Development

PO BOX 109
KEIRAVILLE NSW 2500
Phone: 0419 220 365
Fax: 02 42 259148
Email: sue@ortran.com.au
ABN 37 292 809 645

Executive Summary

The \$200,000,000 made available for the introduction of strategies to prevent the development of T2DM amongst the Australian population, is testament to the changed emphasis in health management by the Rudd Labour Government. In this process, prevention is supported both at the broader level of the health system and at the level of General Practice, with increasing involvement of other allied health practitioners and a more clearly-defined role and function for the Practice Nurse (i.e. new Medicare Item Numbers). In the context of General Practice, it is the Practice Nurse in particular, whose role and responsibilities are gradually evolving to better support GPs in co-management of patients with complex and chronic conditions.

The current Pilot Project, focusing on Self-management tools for Practice Nurses and their Patients, has been provided for Practice Nurses to explore the possibilities for enabling increased levels of self-management in their patients. The Pilot Project has been designed specifically to give Practice Nurses the opportunity to experience, to test out and to judge for themselves, the relevance and usefulness of these tools for self-management in their current role, in their respective contexts of practice.

This Pilot Project, funded by General Practice NSW included:

- A full day experiential workshop, where participants were introduced to and familiarised with, the type of Nurse/patient interactions that support development of patient ownership and responsibility for health-promoting behaviour change
- A Manual for Scaffolding Self-management in patients with: appropriate language to support self-managed change, an integrated interview schedule with a logical flow of use of tools for positive outcomes, and the protocols and sequence of questions for each of the tools in use
- A Kit which included: The Compatibility Communication System card set (CCS); and Tool Templates to be copied for use with individual patients;
- Questionnaires for guided reflection on the information provided in the experiential workshop, and current knowledge, attitudes and practices in selfmanagement for Practice Nurses and their patients

At the request of General Practice NSW, the Pilot Project was evaluated in order to determine the perceived appropriateness and relevance of self-management tools for the role and function of Practice Nurses. Secondly, the evaluation sought to establish any changes that may have occurred as a consequence of the Nurses involvement in the Pilot, with their knowledge, attitudes and behaviours related to self-managed change in their patients. The remainder of the Pilot Project, which followed on from the one-day experiential Workshop involved structured, questionnaire feedback from Practice Nurse participants and regular telephone contact for support and coaching purposes. These activities were initiated by Ortran Self-Management Solutions. The information gathered through the two questionnaires was used for coaching and mentoring in fortnightly phone contacts and as background for private coaching sessions offered to Practice Nurses and provided by staff of Ortran: Self-Management Solutions.

If was evident from the feedback, that Practice Nurse responsibilities within GP practices vary considerably from Practice to Practice. So too does the sense of: professional autonomy; professional isolation from clinical decision-making related to the patients they see; the time that the Practice Nurse has allocated to spend with their patients; and finally, awareness both within the Practice and amongst Practice Nurses, of relevant item numbers under Medicare that could support the Practice Nurse in assisting the GP to comanage their complex and chronic patients more effectively.

It would seem, therefore, that a program of professional development for Practice Nurses, focusing on tools for self-managed change in patients, could be most beneficial for those Practice Nurses who:-

- 1. Either by experience or professional development, have become aware, that many of the current lifestyle-related diseases require the patient to accept personal responsibility for effective self-management. And furthermore, they recognise that *patient self-management* is required if any sustainable positive change in patient health and wellbeing is to result.
- 2. Recognise that although they, the Practice Nurse, have considerable discipline-based knowledge, it is the patient who is the real expert in *self* and that patient information about personal strengths and previous successful experiences, can be vital in supporting the patient's behaviour change.
- 3. Are aware they are not currently providing the necessary support for these patients to enable them to become more effective in managing self.
- 4. Are interested in learning about effective strategies for supporting self-management in these patients
- 5. Make the time to rehearse the skills and strategies, as well as have the professional courage to use them in interactions with patients
- 6. Are aware of relevant Item Numbers under Medicare which will allow them to provide the necessary time and attention to patients who have chronic and complex conditions
- 7. Are able to negotiate with the GP, that appropriate use of these Item Numbers is both warranted and effective, in changing health related behaviours in those patients and furthermore, that use of these Item Numbers can be financially viable.

In the Pilot Project, those Practice Nurses who demonstrated many or all of these preconditions for successful support of self-managed change in patients, self-reported positive changes in their knowledge, attitude and behaviour, as a result of involvement in the 3 month Pilot Project intervention.

Recommendations:-

If Self-Managed change Workshops and tools were to be offered, through General Practice NSW, to Practice Nurses with the above attributes/circumstances, they could be even more effective if personal coaching support were to be provided over a 6 month period of learning-in-action, rather than the 3 months trialled in this Pilot Project.

The Pilot Project in operation

This Pilot Project, funded by General Practice NSW included:

- A full day experiential workshop Participants were introduced to and familiarised with, the type of Nurse/patient interactions that support development of patient ownership and responsibility for health-promoting behaviour change
- A Manual for Scaffolding Self-management in patients Providing examples of language appropriate to supporting self-managed change; an integrated interview schedule with a logical flow of use of tools for positive outcomes; and the protocols and sequence of questions for each of the tools in use
- A Kit The Kit included: The Compatibility Communication System card set (CCS); and Templates for tools to be copied for use with patients;
- **Questionnaires** for guided reflection on: the information provided in the experiential workshop; and knowledge, attitudes and practices in self-management for Practice Nurses and their patients
- *Telephone Coaching for all and Face-to-Face meetings and mentoring* support for Practice Nurses who requested it

Representatives of General Practice NSW are aware of the Workshop content and processes and these are provided in the pdf appended (Appendix 5) and also outlined in Appendix 4. The workshop was delivered by professionals who gained insights and understanding of work context, and information related to relevant Case Studies by interviewing a number of practice nurses and involving staff of the IDGP in design and contextualizing the Workbook and processes.

Of the 10 Practice Nurses enrolled in the Workshop, seven (7) were nominated by staff of Illawarra Division of General Practice. These Nurses were selected because of their demonstrated levels of engagement in Practice support and their 'interest, experience and enthusiasm'. Two (2) were identified and nominated through Sutherland Division. One Practice Nurse from Shoalhaven Division of General Practice, self-nominated for the Workshop as a result of information disseminated by SDGP to Practice Nurses, via emails and promotion at regular scheduled meetings of Practice Nurses

The Self-Managed Change Workshop introduced participants to 11 theoretically complementary tools for self-managed change with enabling structures, that have been used successfully by Allied Health Professionals in provision of services to clients with complex and chronic conditions and in need of managing self more effectively. The Workshop also provided participants with perspectives and strategies related to Dealing with Difficult People.

Workshop Evaluation Responses – How well was the Workshop received by the Practice Nurses?

The workshop was evaluated at the conclusion of the day (see Appendix 3), and consisted of 5 questions requesting comments, and a 6th question requesting identification of the participant's response on a Likert scale.

The components of the workshop that worked well for the participants were:-

- Use of interesting examples and role plays
- Groupwork
- Interacting with other Practice Nurses and learning how to manage
- Learning how to initiate the interview and learning how to use the CCS cards
- Use of open questions and motivational interviewing
- The tools used in interviewing
- The discovery circle for dealing with difficult people

The reasons provided as to why these things worked well for the Practice Nurses included:-

- I learn by doing
- Exchanging ideas is stimulating and I enjoy social interaction
- The use of DVD of interviewing made it easy to understand
- Being with people in similar positions and with similar experiences is stimulating
- The experiences provided me with greater insights into interviewing
- The discovery circle for dealing with difficult people assists me to identify personalities and how to respond to them
- The experiences and tools will aid finding out what the patient's true problem/needs and expectations are
- The session revised Motivational Interviewing and the use of the CCS Cards gives greater insights
- It worked well for me because it is very appropriate to my clinical setting

We then requested information about things **that did not work well** for these participants, the responses from the 3 participants who identified concerns were:

- Choosing a picture (CCS Cards) and relating it to my workplace
- Trying to put into practice in the workplace and time management issues at work reduced the impact I think these tools could have
- This may be difficult to put into practice
- The last hour was a little too long with conflict resolution
- I am unable to follow-up with patients due to time restrictions and I am unable to access Medicare Item Numbers as yet
- Use of big words

In reponse to the request for information about **WHY these things did not work well** for the participants, the following information was provided:

- The presenters had little experience regards to limitations around Practice Nurse Item Numbers
- I cannot implement these tools at present. We need a model that can be implemented in a shorter time frame
- I am a no frills person
- I am on new ground and probably in a situation where I have not as yet assessed my area of need
- Sometimes we do not have the opportunity to follow-up, have a patient return for follow-up care
- Time is going to be a problem, but not impossible

With respect to question 6, participants were requested to provide a response to 8 questions on a *Strongly Agree to No Opinion* continuum.

All participants responded that they Strongly Agreed (SA) or Agreed (A) to all 8 questions, with the exception that *one respondent* who selected Disagree (D) to:-

'The materials provided were useful to me' and

'I would recommend this type of workshop to other Practice Nurses'.

Synopsis of feedback from the Workshop design and delivery by Ortran: Self Management Solutions

The workshop was well planned, delivered, and of value to almost all participants. It consisted of a range of presentation styles reflective of Adult Learning Processes, and provided valuable opportunities for participants to both engage with other Practice Nurses and to learn new skills and practical tools.

The process was considered by participants to be appropriate to their needs, provided them with useful materials and tools, and improved their understanding of self-managed change. Participants indicated they 'grew professionally', improved their confidence in applying tools that would be valuable to them, and were provided experiences that would support their interactions with patients. The participants indicated the workshop was enjoyable and 90% would recommend attendance at the Workshop to other Practice Nurses.

How effective was the Workshop and the Workbook in supporting change in self-management processes?

Several weeks after the Workshop conducted on the 4th April 2008, participants provided feedback via a Questionnaire (mailed to them), that the workshop had been effective in providing them with information that increased their knowledge and awareness about

self-managed change. They also indicated that it had increased their knowledge about the need for self-managed change strategies within individuals who had complex and chronic conditions and it had provided them with insights into what 'self-managed change might look like' in practice. (See Appendix 3)

First Questionnaire

The Questionnaire responses are documented below

1. Knowledge about self-managed change

This question is about the impact of the workshop on your knowledge of self-managed change. (The average rating for Practice Nurses who responded, is indicated in bold)

la. How important has the Workshop been in increasing your knowledge about the need for self-managed change in individuals with complex and chronic conditions.

Not important						V	ery in	nportai	nt
1	2	3	4	5	6	7	8	9	10

1b. How important has the <u>Workbook</u> been in increasing your knowledge about the need for self-managed change in individuals with complex and chronic conditions.

N	lot imp	portant	ţ			V	ery in	nporta	nt
1	2	3	4	5	6	7.9	8	9	10

Ic. How important has the <u>Workshop</u> been in increasing your understanding about what self-managed change might look like in individuals with complex and chronic conditions.

N	lot imp	portant	t	Very important						
1	2	3	4	5	6	7.9	8	9	10	ĺ

2. Attitude towards self-managed change and its use

This question is about changes in **your attitude towards** self-managed change being an important process with your patients

2a. How important has the workshop been in <u>changing your attitude to self-managed change</u> as an important component of supporting individuals with complex and chronic conditions.

No	t impo	rtant					Ve	ry im	portar	ıt
1	2	3	4	5	6	7	8.1	9	10	

The Workshop addressed the issue of a positive change in Practice Nurse attitudes, towards the use of strategies and tools, for self-managed change with their patients. This is an important aspect of professional behaviour, because *without a change in their attitude*, (even with more time being made available to spend with patients), it is unlikely that the Practice Nurse would utilize the strategies that have been shown to be important in changing health-related behaviours.

2b. How important has the workshop been in changing your attitude towards <u>using</u> self-managed change in individuals with complex and chronic conditions.

No	t impo	rtant				V	ery im	portan	t	
1	2	3	4	5	6	7	8	9	10	

Comments that were made about this included:

"The workshop and the workbook provide a very good resource and reinforce strategies." "More training in this would be good". It may be that some of the participants felt as though they might not have the skills well-honed upon completion of the Workshop.

Changes in knowledge and attitude are necessary precursors to behaviour change, and with the above information gained about the Practice Nurse's Knowledge and Attitudes, the following question identified the role of the Workshop in supporting Practice Nurses to introduce self-managed change strategies with their patients.

3. Behaviour

3a. How important has the workshop been in supporting you to introduce self-managed change strategies in your usual Practice Nurse duties?

Not important								ery im	portan	t
1	2	3	4	5	6.8	7	8	9	10	

Question 3a recorded the lowest scores, with 2 individuals recording a 4 and 5. Both of these responses were based on the fact these Practice Nurses believed they did not have the time to introduce the patient to the tools nor use them effectively.

3b. How confident are you, that if you chose to use one or more of the tools, you would be able to do so.

Not confident at all								V	ery co	nfiden	t
	1	2	3	4	5	6	7.1	8	9	10	

3c. How important will the Workbook be in assisting you to use self-managed change strategies in your usual duties?

No	t impo	rtant					V	ery im	portan	t
1	2	3	4	5	6	7.5	8	9	10	1

Written comments made by the participants included:-

'I need even more interviewing practice'

'I don't think I will be able to do this in my practice because of time constraints'.

Second Questionnaire

A second Questionnaire, designed to provide information related to the everyday role of Practice Nurses in General Practice Settings



(Appendix 5), was provided to the participating Practice Nurses. The information gained from this questionnaire allowed Ortran: Self Management Solution's staff to determine where, on a continuum of interactions between the Practice Nurse and their patient, the Project participants could be placed. It also provided basic information related to gender, experience, GP practice data, number of patients seen etc.

Background Information & Demographics

F	29	U	J		7	5,50		
_	29	6	3	2	40	5,30		
F	33	7	8	3	6	10		
F	35	2.5	6	2	4	20		
F	30	6 months	4	2	10	45	25	
Gender	Yrs since grad	Yrs as a PN	# GPs in practice	# Years PN	# Pt with SMC issues	Time spent	# 10997 Sessions/week	

The first thing to notice is that, with the 2nd Questionnnaire, only 4 of the 9 Practice Nurses completed and returned the Questionnaire (in the self addressed and stamped envelope). This may be due to the perception of 'pressure' in the workplace. This limited response also occurred despite telephone contact and encouragement to complete the Questionnaire. Although limited, this information has been included in the evaluation because of the insights it provides into Practice Nurse involvement in the self-management process with their patients.

The second Questionnaire addressed issues around the following topics 3-7 components within each of the respective topic areas. The results are presented by identifying the *modal response*, ie the response that has been selected most frequently by the participants.

Based on your own experience of self-management for patients/clients with chronic and complex conditions, indicate your personal experience with regard to the following statements

Please rate statements on a scale of 1 to 5, where 1 is strongly disagree; 3 is neither agree nor disagree; and 5 is strongly agree.

Modal response of the 4 practice Nurse respondents is highlighted

Traditional role of the Practice Nurse					
	SD		N		SA
Practice Nurses have been expected to tell the patient what they have to do to improve	1	2	3	4	5
their health					
It is important to check that patients understand what they have to do to improve their	1	2	3	4	5
health					
Patient involvement in decision-making has been important in the interview	1	2	3	4	5
Patients have responded best when the health professional (Practice Nurse) gives clear	1	2	3	4	5
instructions about what to do					
The Practice Nurse has had to be prescriptive about what is to be done and when	1	2	3	4	5
Most of the time in the interview has been spent in giving patients instructions	1	2	3	4	5

The previous question targets the Practice Nurse perception of the traditional role of the Practice Nurse, and there is general agreement in the responses, with the exception of the final question, the responses to which included both a 2 and a 4 indicating one agreed, and one Practice Nurse disagreed with the statement.

This following question focuses on the current role within the Practice

My current role within the Practice in supporting the development of self-management skills with patients	SD		N		SA
I am required to support the majority of my patients in self-management in my work	1	2	3	4	5
as a Practice Nurse					
I have appointments under Medicare (Item 10997)	1	2	3	4	5
My Medicare Item # 10997 appointments focus mainly on 'self-management advice'	1	2	3	4	5
The majority of my support for patient self-management, occurs incidentally, ie when I see them about other medical matters	1	2	3	4	5
Incidental meetings with my patients provide me with the best opportunity to support self-management in my patients	1	2	3	4	5

The Practice Nurse role, as identified by the respondents, does not currently require them to support the majority of their patients in the development of sel-management skills in their patients. However, one respondent indicated a rating of 5 – suggesting that their role did involve supporting self-management in the patients.

There were wide ranging responses to the question, 'My Medicare Item # 10997 appointments focus mainly on 'self-management advice', with one Nurse responding with a 4, and another with a 1, suggesting different responsibilities for the Practice Nurse within the different practices. The final two questions yielded largely responses in agreement to the statements, once again suggesting that there is time pressure when the Practice Nurse is conducting formal consultations, and at this stage, self management is generally high on the agenda.

The next question focuses on the Practice Nurse's perception of their effectiveness in supporting patients in self-management. (Once again the emboldened response is the one that is identified most frequently occurring). In the second question, there was no one rating selected by more than one respondent.

My current effectiveness in supporting patients in self-management					
	SD		N		SA
I am developing my skills in the use of self-management tools to support patients	1	2	3	4	5
I am proficient in the use of self-management tools required to support the patient in self-management for better health	1	2	3	4	5
Patients are indicating they intend to become more active in self-managed change	1	2	3	4	5
I have sufficient time to support patients in self-managed change	1	2	3	4	5

There is general agreement that the Practice Nurses consider they are on the path to developing their skills in the use of self-management tools to support patients. However, their current view of their proficiency varied widely, from a rating of 1 through to 4, with one respondent not selecting a response for this question.

The implication that patients might not like to take an active role in their health management is refuted by the responents to this question, with two selecting 4(Agree) as their response. The final statement, referring to the amount of time the Practice Nurse had to support their patients, suggests time is limited. 3 of the 4 respondents answered in the negative.

The next statements relates to the perception that patients need to be more involved in their health and wellbeing.

Statements about the need for patients to be more involved in their health and					
wellbeing	SD		N		SA
Patients with complex and chronic conditions have an important role to play in their health management.	1	2	3	4	5
I believe patients who self-manage well will accept increased responsibility about keeping appointments, taking medication etc	1	2	3	4	5

Patients need to make an effort and be involved in order to improve their health and	1	2	3	4	5
well-being					

The *modal* response for each of these statements was a 5 indicating that all Practice Nurses who responded, strongly agreed with the statements. This response also confirms that these practice Nurses believe, that what the patient does in self-management, is likely to impact on their health and wellbeing.

The next statements relate to changes in effectiveness of Practice Nurse support for self managed change, as a consequence of their current knowledge, skills and competencies. (*Modal* responses emboldened)

Changes in effectiveness of my practice as a result of more knowledge, skills and competencies in self-managed change	SD		N		SA
Upon completion of this project I will be more confident in delivery of self-managed change support for patients	1	2	3	4	5
My patients will understand the need for self-management	1	2	3	4	5
I will have more knowledge with which to support my patients in gaining skills of self- management	1	2	3	4	5
I will understand better the important role of my patient in being involved in self-managed change	1	2	3	4	5
I will listen even more effectively when discussing health matters with my patients	1	2	3	4	5
I will have an increased range of skills with which to support my patients (including motivational interviewing)	1	2	3	4	5
I will have a more efficient interviewing technique	1	2	3	4	5
I will have an increased range of skills with which to support my patients	1	2	3	4	5

The statement 'Upon completion of this project I will be more confident in delivery of self-managed change support for patients', yielded varied reponses ranging from an agreement (4) to a disagreement with the statement (2). It may be that the person who disagreed considered that they were already confident in their abilities, or that the number of opportunities to provide self-managed change to their patients in their current work conditions, was limited.

Responses to the statement, 'My patients will understand the need for self-management' indicated that two of the respondents agree with the statement, suggesting that they believe their input will assist patients to understand the need for self-management, if their health and wellbeing is to be imporved.

'I will have more knowledge with which to support my patients in gaining skills of self-management' resulted in 3 of the respondents indicating a 4. If that is the case, then it is an indication that the Pilot Project has been successful, at least at the level of Practice Nurse knowledge.

'I will understand better the important role of my patient in being involved in self-managed change' resulted in a wide spread of results, from a 5 to a 2. This result suggests that the people indicating a 2, do not believe they will better understand the important role of their patients being involved. The reasons for this are unclear, but could relate to the current knowledge of the Practice Nurse in the area of patient involvement in management of their health.

'I will listen even more effectively when discussing health matters with my patients', yielded a modal rating of 4 and indicated that the Practice Nurses believed that the Pilot Process has had an impact on their listening to their patient, essential in encouraging self-management in individuals with complex and chronic conditions.

'I will have a more efficient interviewing technique' also resulted in a modal rating of 4, implying that efficiency in interviewing will be improved because of the Pilot Project.

The final section of the questionnaire really canvassed what the Practice Nurse considered might be the longer term patient outcomes as a result of positive changes in the Practice Nurse skills related to provision of self-management support. (Modal responses, all 4.)

Change in patient outcomes resulting from an increase in my skills related to providing self-management information and support . (If I improve my skills in supporting self-management in my patients)	SD		N		SA
Patients will feel more confident of their abilities to self manage.	1	2	3	4	5
Patients will be more motivated to play a role in management of their health	1	2	3	4	5
Patients will accept more responsibility for making appropriate choices related to lifestyle	1	2	3	4	5
Patients will feel energised and be more positive about self-management of the health and well being	1	2	3	4	5

All respondents agreed with these statements indicating that there will be positive changes in behaviour of patients when the Practice Nurse has improved skills related to supporting self-managed change. This is very important, in that regardless of their circumstances, the Practice Nurses believe that patients will demonstrate improvements in self-management as a result of improvements in their own professional skill set.

Telephone Coaching Support for Practice Nurse participants

Staff of Ortran: Self-Management Solutions, utilized the information gathered from the Surveys to inform ongoing communications with Practice Nurses via telephone and/or personal interview and coaching sessions.

The participants were contacted by phone on a regular basis. At the time of the first phone interview (within 2 weeks of the Workshop), they provided the following comments related to their post-workshop experiences with self-management. However, it also became evident, during this follow-up support, that the Practice Nurses were often in a most time-pressured environment where 'responding' rather than 'initiating characterised their working day. Gaining access to them via telephone, even when the time to contact them had previously been agreed upon, was difficult.

Please note: one participant declined to have the follow-up support or to remain in the Pilot Project, as she believed there were no opportunities within her current or proposed workload and designated role for interviews of the kind that would support self-managed change. The following comments tendered by this Practice Nurse provide insights into working conditions in which some Nurses may find themselves:-

... 'see little use for the tools as we generally do not have time to use them'-

'To have a (double) consultation (to use the tools) would actually lose the practice money.'

'I therefore will not be actively using your tools, primarily because lack of time and for my boss no real financial incentive'

'Sorry for being negative -I can see how and why it would work in some settings but I don't think practice Nursing is one of them, and definitely not for me'

The first telephone interview

The first interview asked the following three questions:-

- 1. What has worked well for you since the workshop?
- 2. What have you tried that did not go so well?
- 3. Is there anything you need from us to help you in your work?



Feedback themes emeerging from the first of the telephone interviews were:-

Attitude to use of self managed tools in practice:

- Communication is essential, and the way this is done is very important
- The CCS cards worked very well with my family and I will use these with my patients PN 1
- This stuff would have been ideal in my last job (and helped me personally while going through a hard time) PN 2

- I had previously been using some of the tools. I have long term relationships with many of the patients, and I found that even then, the use of the tools helps this process too PN 4
- I find I have better communication with my patients PN 4
- My hearing has improved, I am listening better and getting more information from my patients PN 5
- Good interviewing strategies and great tools being able to 'throw it back to the patient' is excellent PN 5
- The workshop gave me a fresh outlook on the patient interview process I can get more information with more structure **PN** 6
- I find I am now letting the patient take ownership of where they are going and how they are going to get there **PN** 7
- The CCS Cards are visual aids that can also be used when interviewing indigenous patients excellent! PN 7

Professional communication & Learning

• The workshop was particularly good in enabling practice nurses to get together and to discuss their work. PN 2

Time Pressures

- It is really hard as I don't have time to spend with my patients and there are constant interruptions PN 3
- I will need longer time available to be able to use the tools in the interview **PN 6**

Practice Setting

• I am using Item Number 10997 PN 6

The second telephone interview

The participants continued in their work for a further 2 weeks (approximately), at the end of which, a second follow-up phone call was made. Once again, difficulties in accessing the Practice Nurses were experienced, because of the time pressures under which many of these professionals work.

On this occasion, the participants were asked:-

- 1. How are the tools going for you?
- 2. What is not working as well as you would like?
- 3. Is there anything we can do to support you?

Feedback from second interview telephone calls

Attitude to use of self managed tools in practice:

- CCS Cards are excellent PN 1
- These processes work really well when the Practice Nurse has more time, ie during 45 yr health checks **PN1**
- Goal setting information really\useful PN 2



- Use of Importance and Confidence tools really helpful in assisting my patients to set goals PN 2
- Has used cards effectively, and has used them with self and family with very good effect PN 3
- This Nurse found s/he could develop a seamless transition from information gathering, recording and facilitating excellent experience PN 3

Attitude to use of self managed tools in practice:

• Space allocated to me is very small and time is very short PN 6

The Pilot Project process then involved the provision of support for Practice Nurses who believed it might be of value to them. There were 2 Practice Nurses who sought this level of support.

Information related to any Face-to-face support provided to the participants

The Ortran Team provided face-to-face support for the two participants who indicated they would like to have individual coaching sessions. Both of these Practice Nurses sought support and confirmation about the way to conduct an effective interview utilizing either the CCS cards and/ or effective questioning. In both cases, the Practice Nurses felt very much more confident about their capacity to gain appropriate information and, through effective questioning and use of language, support their patients to implement self-management strategies.

One of these Practice Nurses also took up the opportunity to borrow the Ortran Self-Management Solutions DVD offered to participants. This DVD provided a demonstration of an interview process where self-management support strategies and tools were used with a patient. Another two Practice Nurses, both from the same Medical Practice, also borrowed the DVD as follow-up support for their professional development.

Emerging issues for Practice Nurses with implementation of tools

Throughout the 3 month process, a number of themes emerged

1. Time, the belief that Practice Nurses operate in an environment of time pressure

7 of the 9 Practice Nurses who returned the questionnaire commented that they are really pressed for time within the boundaries of their current role and function within GP practice.

2. Apparent lack of autonomy

7 of the 10 Practice Nurses also commented that they often feel as though they are not really members of the clinical team, and have a perception that they are 'powerless' to

modify their role or function. This personal perception actually works against them embracing and implementing self managed change in their patients. Support for patient self-managment is paradigmatically at odds with the circumstances in which they (often) find themselves in their employment. Notwithstanding this perception amongst some of the Practice Nurses, others who had a different relationship with their Practice medical staff and who felt they were valued as professional colleagues, felt that their contribution with regard to self-management support of patients, was both recognised and valued.

Final Contact with Practice Nurses

The Ortran: Self-Management Solutions team contacted the participants one final time in order to gain insights that might only be evident to the Practice Nurses after some longer term involvement both with the self-management tools and with increased confidence resulting from regular use of them.

The questions asked were:-

- 1. What has changed for you in self-management with your patients?
- 2. What is the most notable thing that has happened for you?
- 3. What recommendations would you make to General Practice NSW related to Self-Managed change and the workshop, the tools and the process?

The following comments are representative of those received from the Practice Nurses in response to these questions:-

- 'The course is really great, and self-managed change has a lot to offer to Practice Nurses. The follow-up provided through this workshop was excellent'
- 'Self managed change tools are very useful although I believe that it requires customizing for Practice Nurses. Time! We just do not have the time!
- 'Great initiative, with many worthwhile experiences provided in the workshop and during the follow-up'.

Conclusion

Confidence in skills that support Self-Managed change in patients with complex and chronic conditions, is essential for allied health professionals in an era when these conditions are on the increase. The Federal Government is aware of this, and the previous Howard Government had earmarked \$600,000,000 to ensure that medical and allied health staff are upskilled in this important area of health management.

Practice Nurses are employed within a diverse range of settings and possess widely varied skill sets. They are often working under pressing of time constraints and with reduced professional autonomy. Nurse training has traditionally placed Nursing staff in a role in which independent action is not encouraged and where even appropriate assertiveness in the workplace is often difficult to achieve or manage. Practice Nurse employment is often part-time and/or casual, and the nature of the work required is often

limited by GP awareness and knowledge about the range of financial reimbursements and rewards that a Practice Nurse may attract under Medicare.

Notwithstanding these limitations, there are circumstances where Ortran: Self-Management Solutions would encourage General Practice NSW to offer Self-Managed Workshops to Practice Nurses. These are circumstances where:-

- 1. Either by experience or professional development, Practice Nurses have become aware that many of the current lifestyle-related diseases require the patient to accept personal responsibility for effective self-management. Self-Management is required if any sustainable positive change in patient health and well-being is to result.
- 2. Practice Nurses realize they have considerable discipline-based knowledge, but it is the patient who is the real expert in self. This information related to the strengths of the patient could be used by both the Practice Nurse and the patient to excellent effect.
- 3. Practice Nurses are aware they are not currently providing the necessary support for these patients, support that will allow them to become more effective in managing self.
- 4. Practice Nurses are interested in learning about effective strategies which can be used for supporting self-management in these patients
- 5. Practice Nurses, and indeed the Medical Staff or Practice Manager, are aware of relevant Item Numbers under Medicare which will allow Practice Nurses to support GPs in co-management of the health of some of their patients and provide the necessary time and attention to patients who have chronic and complex conditions.
- 6. Practice Nurses either make the time to rehearse the skills and strategies, or be provided with that time, as well as possessing the professional courage to use these newly acquired skills and strategies in interactions with patients.
- 7. Practice Nurses are equipped to negotiate with the GP the appropriate use of relevant Medicare Item Numbers. The use of these Medicare Item Numbers is both warranted and effective in changing health-related behaviours in those patients with complex and chronic conditions, andmay be financially rewarding for the GP.

For consideration by General Practice NSW

It became evident that although the role of the Practice Nurse may have been elucidated in the documentation on relevant web-sites and promoted within relevant professional bodies e.g., Australian Nursing Federation (2005), ADGP National Practice Nurse Workforce Survey Report (2006), DoHA Nursing in General Practice www.healthl.gov.au/internet/wcms/publishing.nsf/Content/pcd-nursing-index, the participants in the Workshop were utilized by the GPs within their practices for many of the more technical components, testing, measuring, reporting. At this stage there is little or no emphasis on those components of prevention, supporting GPs in the health-care management of their patients and generally increasing self-management amongst patients.

Documents/contacts used to inform the Workshop process and this report

Australian Nursing Federation (2005) Competency Standards for nurses in general practice

Joyce, C., Practice Nurse Work Survey, Monash University, This project has 100 practice Nurses involved. Data collection continues, report will be generated late in 2008 (Personal communication)

ADGP National Practice Nurse Workforce Survey Report, (2006)

DoHA Nursing in General Practice www.health\.gov.au/internet/wcms/publishing.nsf/Content/pcd-nursing-index

DoHA Medicare Benefits Schedule: www9.health.gov.au/mbs

Appendix 1

Letter of invitation for Practice Nurse to become involved in this project Dear Dr xxxx

Re: Workshop on Self-Managed change processes for Practice Nurses

Ortran Self-Management Solutions have been sponsored by the Alliance of NSW Divisions to provide a one day workshop on *Self Managed Change Processes for Practice Nurses*, scheduled to be held at the Illawarra Division of General Practice conference room on Friday 4th April 2008.

This workshop is free of charge and offers practice nurses the opportunity to develop valuable skills to support their role in Enhanced Primary Care (EPC) activities such as GP Management Plans and Team Care Arrangements, as well as health promotion activities, to increase capacity for supported, self-managed behaviour change in your patients.

The workshop is limited to 12 practice nurses only, in order to increase opportunities for personal support in understanding of the processes and gaining expertise and confidence in the use of the tools provided. The workshop includes a manual for each participant, and we will provide fortnightly follow-up phone calls for 2 months to support nurses in implementing new skills and competencies.

Your local division of general practice has selected practice nurses who have been identified as undertaking chronic disease management activities and who work within innovative practices with the capacity to implement initiatives learned at the workshop. We anticipate attendance at the workshop will enable practice nurses to streamline interactions with patients and improve outcomes through self-managed change, by essentially 'working smarter, not harder'.

From our experience delivering similar workshops to Allied Health Professionals nationally, participants have confirmed that their confidence and capacity for supporting self-managed change in patients has been greatly enhanced. Workshop participants have also indicated a noticeable increase in their patients' ownership, understanding and sense of control in health related behaviour change.

We have encouraged practice nurses to talk with their employers regarding attending this workshop, with consideration to the professional growth and learning for the nurse, and benefits to the practice and its patients. We trust you agree that this exciting initiative has the potential to positively impact on the health and well-being of your patients as they interact with your Practice Nurse, and we hope you will support your practice nurse's attendance at the workshop.

Regards

Owen and Sue Curtis
Ortran, Self-Management Solutions

Appendix 2

Workshop Program Friday 4th April 2008:- Conducted at IDGP Offices, Keira St., Wollongong. Telephone contact for ORTRAN 0419 220 365

The total program will be 7 hours duration at the Workshop and regular phone call support and follow-up. The content is outlined below.

9:00	Introduction including Welcome, Principles and Practices important for effective self management
9:15	Effective use of Compatibility Communication System cards in the allied health setting
9:45	Initiating the interview and the use of CCS Cards
10:15	Introduction to the interview process
10:30	Morning tea
10:45	Awareness of Adult Learning Styles
11:00	Nurse Practitioner - Patient partnership and Stages of
	Change
11:30	Revision of Motivational Interviewing and change talk
12:45	Lunch
1:30	Decisional Matrix
2:15	SMART Goals – and progressing from these goals to
	SMARTEST goals
2:45	Importance and Confidence scales
3:30	Afternoon tea break
3:45	The Power Game Triangle
4:15	Transforming the Power Game Triangle
4:30	The Discovery Circle
4:45	Concluding discussion including 5 key principles for
	effective utilization of Self Managed Change in the
	practitioner/patient partnership

Appendix 3 Workshop Evaluation Form

Self-management for Practice Nurses & their patients Workshop Evaluation Form



Please take a few minutes to provide some important details about your experience of this strategic development workshop. This information will be used to adapt and enhance future workshops

- 1. What worked well for you?
- 2. Why do you think it worked well for you?
- 3. What **didn't work** so well for you?
- 4. Why do you think it **didn't work** so well?
- 5. What would you **do differently** to improve this workshop (including other self-management strategies you might be aware of)?
- 6. Please indicate the extent to which you agree with the following statements (circle response)

		Strongly agree	Agree	Disagree	Strongly Disagree	No Opinion
1.	The teaching/learning strategies were appropriate for the audience	1	2	3	4	0
2.	The materials provided were useful to me	1	2	3	4	0
3.	The workshop improved my understanding of this area	1	2	3	4	0
4.	The workshop developed my ability to utilize my skills related to this area	1	2	3	4	0
5.	I am confident I can use the skills in my work	1	2	3	4	0
6.	The range of self-management strategies provided a coherent scaffold for practitioner-client interactions	1	2	3	4	0
7.	I enjoyed the workshop	1	2	3	4	0
8.	I would recommend this type of workshop to other Practice Nurses	1	2	3	4	0

Thank-you for your time and your participation

Appendix 4

Questionnaire 1

Information for use within NSW Alliance of Divisions Evaluation

The following questions are related to your experiences within the Practice Nurse Workshop conducted on Friday 4th April 2008.

1. Knowledge about self-managed change

This question is about the impact of the workshop on your knowledge of self-managed change.

1a. How important has the Workshop been in increasing your knowledge about the need for self-managed change in individuals with complex and chronic conditions.

Not important						Very important						
1	2	3	4	5	6	7	8	9	10			

1b. How important has the <u>Workbook</u> been in increasing your knowledge about the need for self-managed change in individuals with complex and chronic conditions.

Not important						Very important					
1	2	3	4	5	6	7	8	9	10		

1c. How important has the <u>Workshop</u> been in increasing your understanding about what self-managed change might look like in individuals with complex and chronic conditions.

Not important					very important					
1	2	3	4	5	6	7	8	9	10	

Comment:-	-		

2 Attitude towards self-managed change and its use

This question is about changes in **your attitude towards to the use** of self-managed change processes with your patients

2a. How important has the workshop been in <u>changing your attitude to self-managed change</u> as an important component of supporting individuals with complex and chronic conditions.

	Not important							Very important				
	1	2	3	4	5	6	7	8	9	10		
Comment:-												

2b. How impoself-managed of				-						r towards <u>using</u> ons.	
,	_	t impo			T					nportant	
	1	2	3	4	5	6	7	8	9	10	
Comment:-											
										•••••	
1. Behaviour											
									ur lik	ely use of self	
managed chang	ge strat	egies i	n you	r usual	Practi	ce Nu	rse du	ties.			
3a How impo	rtant	has th	e wor	kshop	heen	in su	nnorti	ng vo	u to	introduce self-	
										inii samee sey	
managed change strategies in your usual Practice Nurse duties? Not important Very important											
_	1	2	3	4	5	6	7	8	9	10	
Comment:-											
		• • • • • • •	• • • • • •					• • • • • • •			
										•••••	
3b. How confid	dent a	re you	, that	if you	chose	e to us	se one	or mo	ore of	the tools, you	
would be able t		-		0 0					v	•	
	No	t confi	dent a	t all	1	1		V	ery co	onfident	
	1	2	3	4	5	6	7	8	9	10	
IC		C: -1	44	41		ا	4: ~1	. 4 : 4 . 4 .	.1 4-	:	
confidence leve		comma	em at	me ii	iomen	ı, wna	ı mıgı	Il Il là	ike to	improve your	
Comment:-	J1:										
-				book b	e in as	sisting	g you t	o use s	self-m	anaged change	
strategies in yo								* 7			
	No	t impo	1	1 4	E	6	7			nportant	
	Т	2	3	4	5	6	7	8	9	10	

4. The following questions relate to the tools that were demonstrated and explained in both the Workshop and the Workbook

The tools presented in the workshop were:-CCS Cards Adult learning styles Interviewing strategies Stages of change Motivational Interviewing Decisional Matrix SMARTEST goals Importance and Confidence

4a. Please rank these tools from 1 to 8 in terms of ease of implementing the tool in your normal duties related to self-managed change with your patients. (1 is the easiest and 8 the hardest to implement into your usual duties)

	Ease of implementing
CCS cards	
Adult learning styles	
Interviewing strategies	
Stages of change	
Motivational interviewing	
Decisional matrix	
SMARTEST goals	
Importance and	
confidence scales	

4b. Please indicate which, if any, of the tools below you felt you knew well enough to use in your normal Duties, prior to the Workshop.

	I know/knew about
CCS cards	
Adult learning styles	
Interviewing strategies	
Stages of change	
Motivational interviewing	
Decisional matrix	
SMARTEST goals	
Importance and	
confidence scales	

4c. Please indicate which, if any, of the tools you currently use in your normal Practice Nurse duties.

	I currently use
	[√
CCS cards	
Adult learning styles	
Interviewing strategies	
Stages of change	
Motivational interviewing	
Decisional matrix	
SMARTEST goals	
Importance and	
confidence	

	Pre - contemplation	Contemplation	Determination /preparation	Action	Maintenance	Relapse
CCS cards						
Adult learning styles						
Interviewing strategies						
Stages of change						
Motivational interviewing						
Decisional matrix						
SMARTEST goals						
Importance and confidence						

⁴d. Please indicate, using the Stage of Change model, where you are at the moment in the use of each of these tools. (Your workbook has an explanation of the SOC model)

Appendix 5

Self-management for Practice Nurses and their Patients Questionnaire PART A: Current Self-management in Practice

All information provided is confidential and will be de-identified for final collation and reporting, however we do need to know your name at this stage for individual support & coaching purposes

What is your name;-	
(The information which you provide in the Questionnaire responses will enable us to better understand the changes that occur over the three month period of this project)	
Practice Nurse Profile:	

Please complete the details below: Employment Status: F/T P/T Gender: Female Male Years since graduation Years employed as a Practice Nurse:
Number of GPs in Practice: No of Practice Nurses in Practice
Number of patients you see weekly with emphasis on self-management
Average time spent with patients mins.
Average number of Item # 10997 consultations you provide per week Maximum number of Item #10997 consultations you have provided for any single patient in a calendar year

Based on your own experience of self-management for patients/clients with chronic and complex conditions, indicate your personal experience with regard to the following statements....

Please rate statements on a scale of 1 to 5, where <u>1 is strongly disagree</u>; <u>3 is neither agree nor disagree</u>; and 5 is strongly agree.

Traditional role of the Practice Nurse					
	SD		N		SA
Practice Nurses have been expected to tell the patient what they have to do to improve	1	2	3	4	5
their health					
It is important to check that patients understand what they have to do to improve their	1	2	3	4	5
health					
Patient involvement in decision-making has been important in the interview	1	2	3	4	5
Patients have responded best when the health professional (Practice Nurse) gives clear	1	2	3	4	5
instructions about what to do					
The Practice Nurse has had to be prescriptive about what is to be done and when	1	2	3	4	5
Most of the time in the interview has been spent in giving patients instructions	1	2	3	4	5

	ı	1	1	1	
My current role within the Practice in supporting the development of self- management skills with patients	SD		N		SA
I am required to support the majority of my patients in self-management in my work		2	3	4	5
as a Practice Nurse					
I have appointments under Medicare (Item 10997)	1	2	3	4	5
My Medicare Item # 10997 appointments focus mainly on 'self-management advice'	1	2	3	4	5
The majority of my support for patient self-management, occurs incidentally, ie when I	1	2	3	4	5
see them about other medical matters					
Incidental meetings with my patients provide me with the best opportunity to support	1	2	3	4	5
self-management in my patients					
Comments: If you are not satisfied with your current role in providing self-management support for your patients, what could be done to help you?					
My current effectiveness in supporting patients in self-management	SD		N		SA
I am developing my skills in the use of self-management tools to support patients	1	2	3	4	5
I am proficient in the use of self-management tools required to support the patient in		2	3	4	5
self-management for better health					
Patients are indicating they intend to become more active in self-managed change		2	3	4	5
I have sufficient time to support patients in self-managed change		2	3	4	5
Comments: If you believe you are not as effective as you think you could be in supporting patients in self-management, what do you think it might take to increase your effectiveness? (Remember, you have attended a workshop and have received a workbook with self-managed change tools)					
Statements about the need for patients to be more involved in their health and wellbeing	SD		N		SA
Patients with complex and chronic conditions have an important role to play in their	1	2	3	4	5
health management.					
I believe patients who self-manage well will accept increased responsibility about	1	2	3	4	5
keeping appointments, taking medication etc					
Patients need to make an effort and be involved in order to improve their health and	1	2	3	4	5
well-being					
Comments: If you do not believe you can influence the patient's sense of responsibility for their health and well-being, what do you think would help you?					

Changes in effectiveness of my practice as a result of more knowledge, skills and competencies in self-managed change	SD		N		SA
Upon completion of this project I will be more confident in delivery of self-managed	1	2	3	4	5
change support for patients					
My patients will understand the need for self-management	1	2	3	4	5
I will have more knowledge with which to support my patients in gaining skills of self-management	1	2	3	4	5
I will understand better the important role of my patient in being involved in self-managed change	1	2	3	4	5
I will listen even more effectively when discussing health matters with my patients	1	2	3	4	5
I will have an increased range of skills with which to support my patients (including motivational interviewing)	1	2	3	4	5
I will have a more efficient interviewing technique	1	2	3	4	5
I will have an increased range of skills with which to support my patients		2	3	4	5
Comments: If you do not believe your workpractices will be more effective with patients as a result of your improved knowledge, skills and competencies, what do you think might help you?	1	2	3	4	5
Change in patient outcomes resulting from an increase in my skills related to					
providing self-management information and support . (If I improve my skills in supporting self-management in my patients)	SD		N		SA
Patients will feel more confident of their abilities to self manage.	1	2	3	4	5
Patients will be more motivated to play a role in management of their health	1	2	3	4	5
Patients will accept more responsibility for making appropriate choices related to lifestyle	1	2	3	4	5
Patients will feel energised and be more positive about self-management of the health and well being	1	2	3	4	5

Appendix 6SCOPING STATEMENT for presentation to IDGP

Duoingt Name	Calf Managad Change Stand Jates					
Project Name	Self-Managed Change Start date:					
	Workshop for IDGP Practice Late February 2008					
70.7	Nurses C Division 1 111					
Budget	To be negotiated with NSW Alliance of Divisions and will					
	include:-					
	Workshop fees for IDGP Practice Nurses sponsored by NSW					
	Alliance					
	Evaluation fees – inclusive in funding					
	Incidental expenses such as equipment/facility hire, morning					
	and afternoon tea items, lunch – funded by the Alliance					
Background	Complex and chronic self management may be the only					
	effective strategy where individuals can positively impact on					
	their lifestyle related conditions. Ortran Consulting: Self					
	Management Solutions have developed and delivered self					
	management workshops that have supported a range of allied					
	health professionals in gaining insights and skills required to					
	support individuals with complex and chronic conditions. These					
	one day workshops have been delivered throughout major cities					
	in Eastern Australia – Brisbane, Rockhampton, Sydney,					
	Wollongong, Melbourne and Adelaide and attendees have					
	included Exercise Physiologists, Occupational Therapists etc					
	The NSW Alliance is keen to identify the impact of the toolkit					
	on Practice Nurse behaviours when dealing with patients with					
	complex and chronic conditions in IDGP.					
Goal	To identify the impact of Self Managed Change toolkit on					
	Practice Nurse understanding and practices in supporting					
	individuals with complex and chronic conditions.					
Objectives	Objectives to:-					
	1:- Identify the impact of knowledge about a range of tools					
	targeting self managed change on understanding of Practice					
	Nurses about self managed change					
	2:- To identify the change in attitude of Practice Nurses to the					
	value of self managed change in supporting individuals with					
	complex and chronic conditions					
	3:-To identify the change in professional behaviours of Practice					
	Nurses as a result of exposure to the Toolkit					
	4:- To determine the impact of one or more of the tools within					
	the Toolkit on health related behaviours of patients with					
	complex and chronic conditions, when delivered by Practice					
	Nurses to these patients					
	I					

Deliverables	Self managed Change workshop
Denverables	Manual containing Toolkit of strategies
	3. Evaluation of impact
Outcome measures	Changes in knowledge of self managed change within Practice
outcome measures	Nurses
	Changes in attitude to the use of self managed change within
	Practice Nurses attending the workshop
	Changes in behaviours in supporting patients with complex and
	chronic conditions
	Changes in health related behaviours (or transitional health
	outcomes) of selected patients exposed to tools within the
	Toolkit presented at the workshop and applied by the Practice
	Nurses
	TVUISCS
Stakeholders	Practice Nurses in IDGP
	NSW Alliance
	IDGP
	Ortran Consulting: - Dr Sue Curtis and Mr Owen Curtis
	General Practices with Practice Nurses
Projects Included	Self managed change toolkit for IDGP practice Nurses
Assumptions	The NSW Alliance will financially support the project
_	The IDGP will, through a range of strategies, recruit 12-16
	Practice Nurses for the workshop
	Suitable premises for delivery will be available
	Practice Nurses will find the workshop of interest and possible
	value in their work
	Practice Nurses will implement one or more of the tools in
	interactions with their patients and be prepared to evaluate their
	involvement, behaviours and some patient outcomes
Constraints	Level of support within NSW Alliance, or within IDGP for this
	innovative project
	Interest amongst IDGP Practice Nurses in attending the
	workshop
	Time pressure for IDGP Practice Nurses in attending the
	workshop
	Time pressure for IDGP Practice Nurses in being involved in
	the evaluation of the workshop
Risks	There are no OH and S Risks in participating in this workshop
	Misuse of the tools within the toolkit for control over patients
	rather than support of patients
Dan auti	Outron Consulting will propert to NCW alliance within 2
Reporting	Ortran Consulting will report to NSW alliance within 3 months
	of the workshop, or within the time frame negotiated with NSW
	Alliance. Ortran consulting will report to IDGP and Practice
	Nurses within 3 months of the Workshop

Other	The demands on the IDGP are minimal. Other than promoting the Workshop to Practice Nurses, and administration related to the workshop Recording names and contact details of Practice Nurses attending, providing access to a venue (if IDGP is prepared to provide the venue), and providing contact details to Ortran Consulting, there should be very little demand on IDGP staff/resources.
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