

Restraint Free Care in California

A Training Guide to Equip Long-Term Care Ombudsman Representatives and Consumers to Understand and Promote Restraint Free Care in California Nursing Homes

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Produced by

**NCCNHR: The National Consumer Voice for Quality Long-Term
Care supported by a grant from the California HealthCare
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November 2007

ACKNOWLEDGMENTS

Many thanks to the Advisory Committee for their suggestions and support in developing this training program and these materials. The Advisory Committee members are: *Victoria Behbahani*, Aging Program Analyst II, *Jana Matal*, Manager, and *Joseph Rodrigues*, State Long-Term Care Ombudsman, California Department of Aging, Office of the Long-Term Care Ombudsman, Sacramento; *Molly Davies*, Program Director, WISE Senior Services, Long-Term Care Ombudsman Program (LTCOP), Santa Monica; *Tippy Irwin*, Coordinator, Ombudsman Services of San Mateo County, LTCOP; *Benson Nadell*, Program Coordinator, San Francisco Long-Term Care Ombudsman, Family Service Agency of San Francisco, Coordinator, California Local Long-Term Care Ombudsman Association (CLTCOA); *Rochelle Woolery*, Ombudsman Program Coordinator, Council on Aging, Orange County; *Joann Kidd*, Family Member, Volunteer Ombudsman Representative; *Beryl Goldman*, Kendal Corporation, Pennsylvania; *Charlene Harrington*, Professor and Associate Director, University of California San Francisco/John A. Hartford Center of Geriatric Nursing Excellence; *Mary Larson*, Healthcare Consultant II, Interim Senior Project Manager, LUMETRA; *Joanne Rader*, Associate Professor, Oregon Health Science University; *Joyce Sakkinen*, Health Facilities Evaluator Nurse, Specialty Trainer, California Department of Public Health, Licensing and Certification.

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ABOUT THE TRAINING GUIDE

The development of this training guide was supported by a grant from the California HealthCare Foundation, based in Oakland, California.

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TRAINING GUIDE

Introduction

Ombudsmen are uniquely positioned to improve the quality of life of residents by advocating in their day to day work for reducing restraints. This is particularly true in California where restraint usage is among the highest in the country.

This guide provides the essential information and resources for the training of ombudsman representatives who can ultimately improve the daily lives of residents by identifying restraints, advocating for the elimination of restraints, and empowering consumers to seek, and expect, restraint free care. Use this training guide to improve ombudsman representatives' knowledge, skills, and commitment in advocating for restraint free care. Be instrumental in changing practices in your state!

There is national momentum to eliminate or reduce restraints. Currently the Centers for Medicare and Medicaid Services and the Advancing Excellence Campaign are providing national visibility and resources for reducing restraint usage. These efforts provide a unique opportunity for synergy to boost your advocacy.

This training guide is based on a California Long-Term Care Ombudsman Training Conference session conducted on June 13, 2007, in Sacramento. The material was developed and presented by Alice Hedt, NCCNHR Executive Director, Sarah Greene Burger, Consultant, and Jessica Brill, NCCNHR Project Coordinator.

Purpose

This training guide is intended to assist California Long-Term Care Ombudsman Coordinators (LTCO) in teaching ombudsman representatives about achieving restraint free care. This guide may also be adapted to use in teaching consumers and others about restraint free care.

Learning Objectives

At the conclusion of all four content segments participants will know:

- What restraints are,
- How restraints impact residents,
- Good care practices that preclude restraints,
- Applicable law and regulations,
- How to apply this content in individual advocacy and in talking with consumers and caregivers,
- Resources and support through the Advancing Excellence Campaign and other sources.

Options for Teaching

The content in this guide was presented in a day long session. Recognizing that many LTCO must present training in shorter sessions, this guide contains sections of content that may be used as stand alone presentations or combined in a way that best fits your available time frame and purpose. The Content Overview on the following page contains a brief description of the four content segments and time frames for teaching.

A range of teaching times are given for each segment. Time frames for teaching vary according to:

- the amount of discussion you include,
- the number of examples from your program or area you use, and
- how knowledgeable participants are about restraints, the Advancing Excellence Campaign, and resources.

Tips:

- Select the content and handouts according to the needs of the participants. Although each topic has a list of suggested handouts, you may decide to use different ones based on your training objectives.
- If you are teaching ombudsman representatives whose training included the 2007 California LTCOP curriculum module, “The Aging Process” or “Residents’ Rights,” or another session on restraints, identify the sections and teaching tools in this guide that will increase or reinforce their knowledge and skills.
- Remember that there are even more resource materials on the NCCNHR website section, California Voices for Quality: http://www.nccnhr.org/public/245_1266_13817.cfm as well as on other sections of the NCCNHR website.
- For even more fun with a group of knowledgeable LTCO, introduce the content and resources in this guide and ask them how they might use this information in talking with family members or with resident or family councils. ☺

Content Overview

You will need to add some additional time for introductions and breaks.

TOPIC	DESCRIPTION	TIME TO TEACH
Restraints	What are restraints? Who is restrained and why? Why are restraints dangerous? What does the law say? What is it like to be restrained?	1 – 1.5 hours
Good Care Practices Preclude Restraints	Knowing each person; Promoting functioning; “Everyone Wins” video and discussion; Alternatives to restraints, Good Care Practices Preclude Restraints.	1 – 1.5 hours
Apply Your Knowledge to	Small group dialogue and problem-solving	0.75 – 1.5 hours

Restraint Free in California: LTCO Training Guide

TOPIC	DESCRIPTION	TIME TO TEACH
Assist Residents	regarding specific examples to apply resident directed care principles and to identify the role of the LTCO.	
Strategies to Decrease Restraint Use in California	Discussing ways that this LTCO Program can address the use of restraints and consumer education. Introduce tools and resources for advocacy and consumer information. Connect the restraint reduction effort with national emphasis and resources through the Advancing Excellence Campaign. Discuss goals, consumer and provider participation; tools and resources available online.	0.75 – 1.5 hours

RESTRAINTS

Teaching Points

- What is a restraint?
 - Facts and Strategies, PowerPoint (PPT) slides 1 – 7
- Who is restrained and why?
 - PPT slides 8 - 9
- Why are restraints dangerous?
 - If you use the Experience Restraints Exercise, ask the individuals who are restrained to share their reactions and observations. Option: If you reach this point less than one hour after the restraints were applied, skip this question. Ask it after you discuss the Informed Consent for Restraints developed by Dr. Miles.
 - If individuals were not restrained during this session, ask participants, “During your visits to facilities, what do you hear residents saying? What have you observed when individuals are restrained?”
 - Demonstrate on yourself or someone else, the areas of the body where pressure sores are most likely to occur. (heels, buttocks, elbows) Relate this to restraints and body areas where pressure is experienced as a result of the restraint.
 - Review and discuss the effects of restraints, including the impact on functioning. Refer to the PowerPoint slide notes for additional speaking points, PPT slides 10 – 16.
- What do staff have to do to make up for the lack of independence due to restraints? How much time do these tasks take? Capture responses on flip chart page divided into two columns: staff actions, time estimates.
- How do the laws and regulations relate to using restraints?
 - PPT slides 17 – 30
 - The Informed Consent for Restraints developed by Dr. Miles includes information pertinent to making a truly informed decision. This consent form is also useful for educating families, staff, and some residents about the risks of using physical restraints.
 - PPT slides 31 - 32.

Application Exercise

Use as time permits and as applicable to increase the audience’s knowledge.

Experiencing Restraints Exercise

Add an extra fifteen to thirty minutes to the overall session time in order to conduct this exercise. The debriefing time, sharing of experiences and observations, is critical to making this a learning experience. If sufficient time cannot be added, skip this exercise.

Complete instructions for this exercise are included on page 18 in this guide.

PowerPoint Presentation

Facts and Strategies: Restraint Free Care is the Standard (includes speaker notes)

Available at: <http://www.nccnhr.org/uploads/FactsandStrategiesPresentation.ppt>.

*(Important: Save the PowerPoint file to your workspace **BEFORE** you open it, allowing you to view it in the PowerPoint program, and see the speaker notes.)*

Handouts

Print and copy handouts with blanks for notes of the PowerPoint presentation slides you will use.

Available at: <http://www.nccnhr.org/uploads/FactsandStrategiesPresentation.ppt>.

*(Important: Save the PowerPoint file to your workspace **BEFORE** you open it, allowing you to view it in the PowerPoint program, and see the speaker notes.)*

Informed Consent for Restraints, developed by Dr. Miles.

Available at:

<http://www.nccnhr.org/uploads/MilesrestraintconsentediedBYSteveMiles0903.pdf>.

Physical Restraints: Decision Tree

Available at: <http://www.nccnhr.org/uploads/T2PhysicalRestraintsDecisionTree.pdf>.

Restraint Reduction Evaluation Trees: Falls, Behavior Symptoms, Wandering

Available at: <http://www.nccnhr.org/uploads/T3RestraintReductionEval.Trees-Falls,BehaviorSymptoms,WanderingandMedicalNecessity.pdf>.

Federal Law and Appendix PP: Restraints

Available at: <http://www.nccnhr.org/uploads/T12FederalLawandAppendixPP-Restraints.pdf>.

Federal Law and Appendix PP: Quality of Care

Available at: <http://www.nccnhr.org/uploads/T13FederalLawandAppendixPP-QualityofCare.pdf>.

California Code of Regulations: 72527 (Residents' Rights)

Available at: <http://www.nccnhr.org/uploads/T15CaliforniaCodeofRegulations72527.pdf>.

California Code of Regulations: 72528 (Informed Consent)

Available at: <http://www.nccnhr.org/uploads/T16CaliforniaCodeofRegulations72528.pdf>.

Be Prepared with

(Choose the ones applicable to your methodology.)

Flip chart and markers and easel or stand

Equipment to show the PowerPoint presentation

Copies of all handouts

Extra pencils and paper for individuals who might need something for taking notes

Restraints and someone who knows how to apply them.

GOOD CARE PRACTICES PRECLUDE RESTRAINTS

Teaching Points

- Assessment and recognition of the symptom
 - Mrs. Torselli, Facts and Strategies PowerPoint (PPT) slides 33 – 34
- Diagnosis and identification of the cause
 - PPT slides 35 - 36
- Care Planning – individualized and what does that mean?
 - PPT slide 37
- Implementation of the care plan
 - PPT slides 38 - 39
- Summary and action steps applicable to any situation
 - PPT slides 40 – 41
- Application questions
 - PPT slide 42
- Replacing restraints with good care practices: If “Everyone Wins” will be used, PPT slide 43 gives a key focus question for noticing during the video and for follow-up dialogue.

Application Exercise

Use as time permits and as applicable to increase the audience’s knowledge.

Everyone Wins Video and Discussion

Allow thirty to forty-five minutes for this video and discussion.

Show this fifteen minute video.

- Review of risks of using restraints.
- How were the family member’s concerns were handled by the facility? Was the facility personnel respectful? Surveyors?
- Is going slow good?
- What was the key to keeping the husband having comfort (trust) with the facility?
- What was the role of his friend?
- What were the systems in place to help residents?
- Distribute the handout, “That’s Great for Other Families, but...” and ask if this information might have been helpful to the family members in this video. Encourage ombudsman representatives to use this handout as an educational tool.
- Distribute the “Guide with Video” handout and talk about how ombudsman representatives can use this with consumers.

PowerPoint Presentation

Facts and Strategies: Restraint Free Care is the Standard (includes speaker notes)

Available at:

<http://www.nccnhr.org/uploads/FactsandStrategiesPresentation.ppt>. *(Important: Save the PowerPoint file to your workspace **BEFORE** you open it, allowing you to view it in the PowerPoint program, and see the speaker notes.)*

Handouts

Print and copy handouts with blanks for notes of the PowerPoint presentation slides you will use.

Available at: <http://www.nccnhr.org/uploads/FactsandStrategiesPresentation.ppt>.

*(Important: Save the PowerPoint file to your workspace **BEFORE** you open it, allowing you to view it in the PowerPoint program, and see the speaker notes.)*

Guide with Video: Everyone Wins! The Family Guide to Restraint Free Care

Available at: <http://www.nccnhr.org/uploads/T11GuidewithVideo-EveryoneWins.pdf>.

That's Great for Other Families but...

Available at: <http://www.nccnhr.org/uploads/C2ThatsGreatforOtherFamiliesBut.pdf>.

Resident Information

Available at: <http://www.nccnhr.org/uploads/C3ResidentInformation.pdf>.

Restraint Risks

Available at: <http://www.nccnhr.org/uploads/C5RestraintRisks.pdf>.

Change Ideas for Creating Pleasant Bathing

Available at:

<http://www.nccnhr.org/uploads/T4ChangeIdeasforCreatingPleasantBathing.pdf>.

Change Ideas for Sleeping and Waking

Available at: <http://www.nccnhr.org/uploads/T5ChangeIdeasforSleepingandWaking.pdf>.

Guidelines for Placing Mattress on Low Platform

Available at:

<http://www.nccnhr.org/uploads/T6GuidelinesforPlacingMattressonLowPlatform.pdf>.

Individualized Care: Life Without Bedrails

Available at: <http://www.nccnhr.org/uploads/T7IndividualizedCare-LifeWithoutBedrails-WheelchairSeatingasaRoadtoRestraint-FreeCare.pdf>.

Individualize Wheelchair Seating: For Older Adults

Available at:

<http://www.nccnhr.org/uploads/T8IndividualizedWheelchairSeatingForOlderAdults.pdf>.

Physical Restraints: Essential Systems for Quality Care

Available at:

<http://www.nccnhr.org/uploads/T9PhysicalRestraintsEssentialSystemsforQualityCare.pdf>

Restraint Reduction Resource List

Available at: <http://www.nccnhr.org/uploads/T17RestraintReductionResourceList.pdf>.

Restraint Guidelines annotated with evidence bases

Available at: <http://www.nccnhr.org/uploads/T18PhysicalRestraints-AnnotatedGuidelines.pdf>.

Alternatives to Restraints

Available at: <http://www.nccnhr.org/uploads/C1AlternativestoRestraints.pdf>.

Be Prepared with

(Choose the ones applicable to your methodology.)

Flip chart and markers and easel or stand

Equipment to show the PowerPoint presentation

Equipment to play the video

Copies of all handouts

Extra pencils and paper for individuals who might need something for taking notes

APPLY YOUR KNOWLEDGE to ASSIST RESIDENTS

Teaching Points

- Good Care Practices Preclude Restraints: Facts and Strategies PowerPoint (PPT) slides 43- 44.
Overview of good practices and may be used as a review or as an introduction. As you cover each topic, refer to key information from the applicable handout to encourage ombudsman representatives to use the handout information as an advocacy resource.
 - Individual/environmental/organizational
 - Promote resident's function
 - Minimize likelihood of resident needing to get up unaided
 - Customize seating
 - Well lighted safe facility
 - Home environment – culture change
 - Culture change grew out of the restraint reduction movement. In the 1980's Carter Williams went to Europe to study what they do in providing care to frail elders without restraints.
 - Decrease the risk of resident wandering.
 - One cause of distress for other residents is to have individuals with dementia wandering into their space. Can use dutch doors, police tapes, dark linoleum
 - Accept the fact that restless, anxious residents must be encouraged to walk when able and plan for that in the individualized care plan.
 - Re-evaluate life support measures – delirium. If a resident has delirium, a restraint may be necessary in order to determine and treat the cause of the delirium. If the cause is not found and treated, death may result. Thus, the risk of using a restraint for a short time outweighs the risk of death from untreated delirium.
- Apply your knowledge: Mrs. Betts, Mr. Gonzales and Mrs. Chin Ling, PPT slide 45
 - Divide into small groups, assign a reporter for each group, set time limit for group work.
 - Refer to PPT presenter notes for ideas.
 - Reports from groups. Point out key aspects of good care practices to eliminate or avoid restraints.
 - Be clear about the role of ombudsman representatives.
- Summarize with the handout, “How Quality Care Practices Preclude Restraint Use for Nursing Home Residents.”

PowerPoint Presentation

Facts and Strategies: Restraint Free Care is the Standard (includes speaker notes)

Available at:

<http://www.nccnhr.org/uploads/FactsandStrategiesPresentation.ppt>. (*Important: Save the PowerPoint file to your workspace **BEFORE** you open it, allowing you to view it in the PowerPoint program, and see the speaker notes.*)

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*(Important: Save the PowerPoint file to your workspace **BEFORE** you open it, allowing you to view it in the PowerPoint program, and see the speaker notes.)*

Scenarios: Mrs. Betts, Mr. Gonzales, and Mrs. Chin Ling

Available at: <http://www.nccnhr.org/uploads/T1Scenarios.pdf>.

Physical Restraints: Decision Tree

Available at: <http://www.nccnhr.org/uploads/T2PhysicalRestraintsDecisionTree.pdf>.

Restraint Reduction Evaluation Trees: Falls, Behavior Symptoms, Wandering

Available at: <http://www.nccnhr.org/uploads/T3RestraintReductionEval.Trees-Falls,BehaviorSymptoms,WanderingandMedicalNecessity.pdf>.

Change Ideas for Creating Pleasant Bathing

Available online at:

<http://www.nccnhr.org/uploads/T4ChangeIdeasforCreatingPleasantBathing.pdf>.

Change Ideas for Sleeping and Waking

Available at: <http://www.nccnhr.org/uploads/T5ChangeIdeasforSleepingandWaking.pdf>.

Guidelines for Placing Mattress on Low Platform

Available at:

<http://www.nccnhr.org/uploads/T6GuidelinesforPlacingMattressonLowPlatform.pdf>.

Individualized Care: Life Without Bedrails

Available at: <http://www.nccnhr.org/uploads/T7IndividualizedCare-LifeWithoutBedrails-WheelchairSeatingasaRoadtoRestraint-FreeCare.pdf>.

Individualized Wheelchair Seating: For Older Adults

Available at:

<http://www.nccnhr.org/uploads/T8IndividualizedWheelchairSeatingForOlderAdults.pdf>.

Physical Restraints: Essential Systems for Quality Care

Available at:

<http://www.nccnhr.org/uploads/T9PhysicalRestraintsEssentialSystemsforQualityCare.pdf>

Restraint Reduction Resource List

Available at: <http://www.nccnhr.org/uploads/T17RestraintReductionResourceList.pdf>.

Restraint Guidelines annotated with evidence bases

Available at: <http://www.nccnhr.org/uploads/T18PhysicalRestraints-AnnotatedGuidelines.pdf>.

How Quality Care Practices Preclude Restraint Use for Nursing Home Residents

Available at:

<http://www.nccnhr.org/uploads/NCCNHRHowQualityCarePracticesPrecludeRestraintUseforNursingHomeResidentsinformationpiece6.5.06.pdf>.

Alternatives to Restraints

Available at: <http://www.nccnhr.org/uploads/C1AlternativestoRestraints.pdf>.

Be Prepared with

(Choose the ones applicable to your methodology.)

Flip chart and markers and easel or stand

Equipment to show the PowerPoint presentation

Copies of all handouts

Extra pencils and paper for individuals who might need something for taking notes

STRATEGIES to DECREASE RESTRAINT USE in CALIFORNIA

Teaching Points

- There is a national campaign that relates to the restraint reduction efforts in California: Advancing Excellence (AE). Promoting Quality PowerPoint (PPT) slides 17 – 22
 - AE provides visibility, resources, and support for the focus on restraints.
 - AE is an opportunity for ombudsman representatives and consumers to push for good care and to ask facilities what they are doing in specific areas.
 - AE provides additional public information about facilities that participate.
 - AE adds momentum to the dialogue about reducing restraints, consistent assignment, and other key areas of care.
- Ombudsman representatives and consumer can participate in promoting quality through this campaign. PPT slides 23 – 29.
- Select some of the handout resources primarily for ombudsman representatives.
 - Review these. The consumer fact sheet “Expect and Promote Excellence” would be a good starting point.
 - Refer to the “Project Overview and Action List” for additional ideas for advocacy.
 - Ask, “How might this information (on the handouts) be used in individual advocacy?”
 - “How might it be used to inform facility staff or to deal with a widespread practice?”
 - Capture the ideas on a flip chart.
- If time permits, discuss similarities and differences between restraints in nursing facilities and in residential care facilities for the elderly. Include points such as:
 - Differences in residents’ rights,
 - How residents are restrained, e.g. chair is positioned close to a wall so that resident cannot get up;
 - The impact of restraints on resident functioning and quality of life.
 - How ombudsman representatives can address restraints in individual advocacy or in educating staff.
- Select some of the handout resources primarily for consumer education.
 - Review these.
 - Ask, “How might this information be used with consumers? Family councils? Resident councils?”
 - Refer to the “Project Overview and Action List” for additional ideas for consumer education.
 - Capture the ideas on a flip chart.
- Review the restraint reduction information for presenting to resident or family councils that was provided by the California Office of the LTCO, adapted from Texas. Discuss how to use this information.
- There are many resources and opportunities for advocates to promote reducing restraints. Ombudsman representatives need to incorporate this knowledge and awareness into their daily work.

- Summarize by listing key actions for individual ombudsman representatives to implement and actions that the local program will implement. Use ideas from the preceding discussions about individual advocacy and consumer education for the summary.

PowerPoint Presentation

Promoting Quality: Opportunity for Advocates to Make a Difference, Alice Hedt, June 13, 2007

Available at: <http://www.nccnhr.org/uploads/PromotingQualityPresentation.ppt>.
(Important: Save the PowerPoint file to your workspace **BEFORE** you open it, allowing you to view it in the PowerPoint program.)

Handouts

Print and copy handouts with blanks for notes of the PowerPoint presentation slides you will use.

Available at: <http://www.nccnhr.org/uploads/PromotingQualityPresentation.ppt>.
(Important: Save the PowerPoint file to your workspace **BEFORE** you open it, allowing you to view it in the PowerPoint program.)

Consumer fact sheet: “Expect and Promote Excellence in California Nursing Homes: Physical Restraint Free Care”

Available at: <http://www.nccnhr.org/uploads/FactSheet.pdf>.

Project Overview and Action Checklist

Available at: <http://www.nccnhr.org/uploads/FallT1Projectoverviewandchecklist.pdf>

Summary: Advancing Excellence in America’s Nursing Homes Campaign

Available at: <http://www.nccnhr.org/uploads/T1SummaryofAECampaign.pdf>.

Goals: How the Campaign Goals Will Improve Quality

Available at: <http://www.nccnhr.org/uploads/T3AEQualityCampaignGoals.pdf>.

Technical Goals: Advancing Excellence Campaign

Available at: <http://www.nccnhr.org/uploads/T4AETechGoals.pdf>.

NCCNHR position on Advancing Excellence Campaign

Available at: <http://www.nccnhr.org/uploads/T5NCCNHRltrAECampaign.pdf>.

Tips for Local Ombudsmen in Advancing Excellence Campaign

Available at:

<http://www.nccnhr.org/uploads/T9TipsforlocalombudsmeninAECampaing.pdf>.

Consumer Involvement in Advancing Excellence Campaign

Available at:

<http://www.nccnhr.org/uploads/T10ConsumerInvolvementCampaignwgoals307.pdf>.

Consumer Resources:

NCCNHR Guide to Choosing a Nursing Home

Available at: <http://www.nccnhr.org/uploads/C1GuidetoChoosingaNH.pdf>.

Consumer Fact Sheet: Advancing Excellence Campaign

Available at: <http://www.nccnhr.org/uploads/C2ConsumerFactSheet.pdf>.

Sample letter to Resident Councils for Advancing Excellence Campaign

Available at: <http://www.nccnhr.org/uploads/C6SampleLtrtoRes.Council.CO.pdf>.

Restraints:

Expect and Promote Excellence in California Nursing Homes: Physical Restraint Free Care:
Consumer Fact Sheet

Available at: <http://www.nccnhr.org/uploads/FactSheet.pdf>.

Resources contributed by the State Office of the Long Term Care Ombudsman:

Alternatives to Restraints

Available at: <http://www.nccnhr.org/uploads/C1AlternativestoRestraints.pdf>.

Guide with Video: Everyone Wins! The Family Guide to Restraint Free Care

Available at: <http://www.nccnhr.org/uploads/T11GuidewithVideo-EveryoneWins.pdf>.

That's Great for Other Families but...

Available at: <http://www.nccnhr.org/uploads/C2ThatsGreatforOtherFamiliesBut.pdf>.

Resident Information

Available at: <http://www.nccnhr.org/uploads/C3ResidentInformation.pdf>.

Restraint Reduction

Available at: <http://www.nccnhr.org/uploads/C4RestraintReduction.pdf>.

Restraint Risks

Available at: <http://www.nccnhr.org/uploads/C5RestraintRisks.pdf>.

Restraint Reduction: Presentation to Family Councils

Available at:

<http://www.nccnhr.org/uploads/C6RestraintReductionPresentationtoFamilyCouncils-SampleAgenda.pdf>.

Be Prepared with

(Choose the ones applicable to your methodology.)

Flip chart and markers and easel or stand

Equipment to show the PowerPoint presentation

Copies of all handouts

Extra pencils and paper for individuals who might need something for taking notes

Experiencing Restraints Exercise Instructions

Purpose: To increase personal understanding about the effects of restraints.

Supplies needed: a variety of physical restraints such as vests, lap belts, mitts, chair alarms, lap buddies

Expertise needed: proper application of restraints

Instructions:

- Without any explanation or instructions, apply the restraints to individuals in the session. Do not ask permission to restrain someone!
- Conduct the session as if there nothing was different than in any other training session.
- If a break occurs, even for lunch, do not pay attention to individuals who are restrained or ask them if they want to be released.
- As indicated in the Teaching Points, ask the individuals who were restrained to share their reactions and observations. If necessary, push them a bit to be very honest. Then ask individuals around them to share their observations. Capture salient points on the flip chart.
- Remove the restraints.
- Ask everyone what they gained from this exercise.
- How will they use this information or perspective in their work?

Tips:

- If possible, apply the restraints early in the day or session to provide a more realistic experience of being restrained.
- If possible, ask someone to apply the restraints while you are introducing the session or you apply them while someone else is making announcements or giving information.
- Try to include a break during the session while individuals are restrained.
- Be vague if questions are asked about assisting a restrained person, particularly during a break.