Advocacy: Strategies for Staff under Stress

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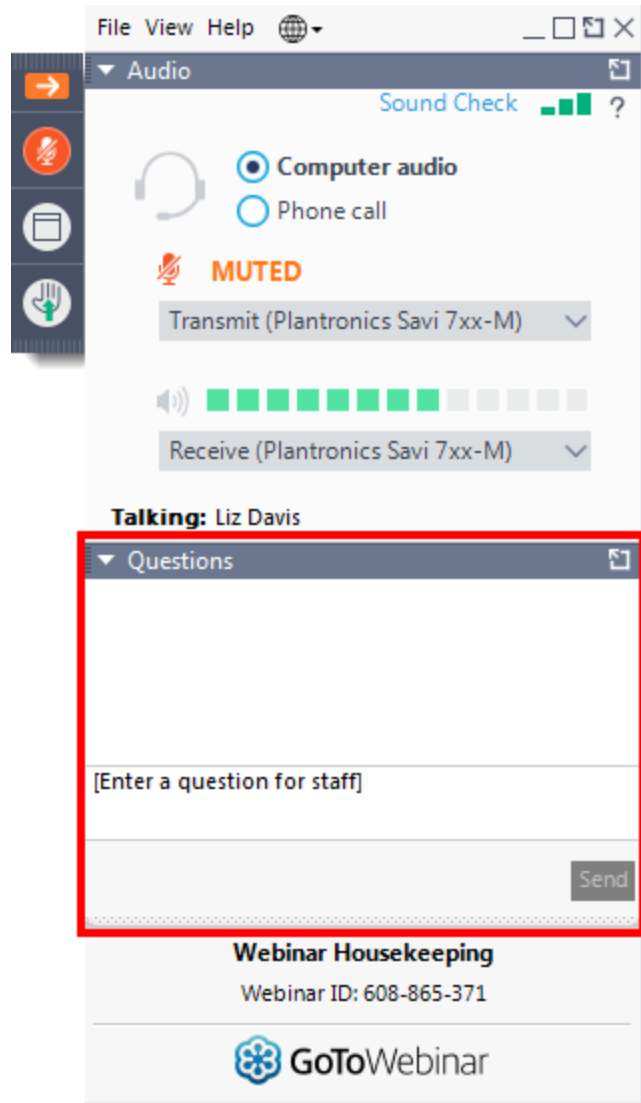
Your Participation

To open and close your control panel click the orange arrow

Submit questions and comments via the Questions panel.

Note: Today's presentation is being recorded and will be available on the Sigma Repository in approximately one week.

Course Objectives

- Define advocacy and advocate

- Discuss the skills of an advocate

- List the steps in the advocacy process

- Apply advocacy skills to various situations and venues

- Identify potential challenges and facilitators to advocacy

- Differentiate between advocacy and activism, and application of each

Overview

These are unprecedented times, requiring new skills and ways of thinking. Some of the challenges we are experiencing include:

- Societal and demographic changes
- Political and social divisiveness and unrest
- Health care system challenges
- Most pervasive pandemic of our lifetime
  - Untold loss of life and health
  - Upended lives of our citizens
  - Unimagined stress and sacrifice for health care providers (HCP)
  - Economic uncertainty impacting individuals, businesses and industries

Pandemic Driven Healthcare Issues

The current pandemic has resulted in:

- Unprecedented demand on the health care system:
  - Sudden onset of the pandemic
  - High prevalence, morbidity and mortality
  - Novel, dynamic nature - active learning to determine best practices
- Stretched capacity for both acute care, and across the continuum
    Increased workload – volume, intensity, staffing shortages
- Lack of resources – PPE, supplies, equipment
- Concerns for personal and family safety – Fears of infection for self and transmission to family members

# Pandemic Driven Healthcare Issues

- Emotional reactions of healthcare providers:
  - Fear, stress, anxiety, anger and depression
  - Burnout, helplessness, stress reaction
  - Social isolation and loneliness
  - Long hours – fatigue and sleep deprivation
- Ethical and moral issues:
  - Inability to meet the needs of patients – moral dilemmas
  - Ethical conflicts - moral distress for caregivers
- Time pressures in personal lives - supporting children, elderly parents
- Financial challenges
- Public reactions of fear toward HCP
- Frustration with public resistance to preventive measures – distancing, masks, isolation

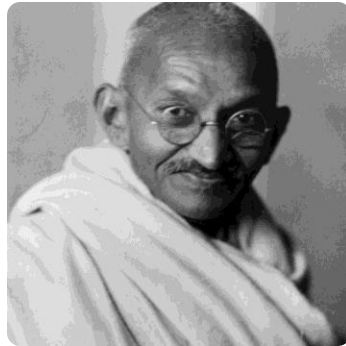One Answer to the Issues Faced by Healthcare Professionals:

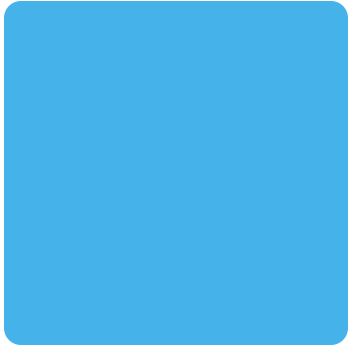# ADVOCACY

Why Advocacy and Why Now?

While not new, advocacy may be a different approach:
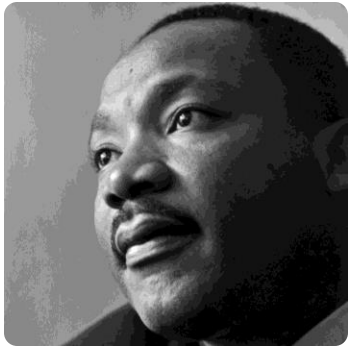
1964 Photo by Reg Lancaster *1941 Photo by Elliot & Fry*

6/11/2005 Tromso, Norway

- Foster change using strategies that build consensus
- Useful in any situation and setting to foster change
- Positive approach, build relationships, promote solutions
- Helps individuals find their own voice for self advocacy
- Empowers change from the grass roots
- Advocacy skills have been used to affect change - Gandhi, Martin Luther King, Nelson Mandela, others

What is Advocacy?

Advocacy is the act or process of supporting a cause or proposal

An advocate is one that pleads, defends or supports a cause or interest of another - (Merriam-Webster Collegiate Dictionary)

What is Advocacy?

Advocacy is defined by the American Nurses Association (ANA) as "the act of pleading, supporting or recommending a cause or course of action. Advocacy may be for persons (individual, group, population or society) or for an issue" - (ANA, 2015, pg 41)

What is Advocacy?

Persuading people who matter to care about your issue in order to want to adopt your ideas.

It means:

- Getting listened to
- Being at the table when decisions are made
- Facing and overcoming resistance
- Speaking and writing in compelling ways

– (John Daly, 2011)

Types of Advocacy

- Person Advocacy
  - Self, Individual
  - Family, community
  - Team, department
- Issue or Cause Advocacy
  - Resources
  - Policy/Law
  - Other
- Internal or External Advocacy

How to be a Successful Advocate

SKILLS OF AN ADVOCATE

Effective Advocates

Effective Advocates are:

- Problem Solvers

- Communicators

- Influencer

- Collaborators

- Resource Brokers

Problem Solving

Advocacy is about solving problems, issues or concerns. To solve problems, it is important to:

- Fully understand the issue

- Identify how and by whom decisions will be made

- Develop a compelling request targeted to decision makers

- Have patience and a sense of timing:
  - Few victories are achieved on the first attempt
  - Issues are often more complex that we realize
  - May require a series of actions over time to achieve goal

- Most advocacy initiatives are accomplished through collaboration, negotiation and compromise

Steps in the Advocacy Process

- Identify the Problem
  - Be as specific as possible
  - Evaluate the present state and how it differs from the goal state
  - Identify the resources needed – information, people, assets
- Analyze the Problem
  - Seek out other perspectives
  - Brainstorm all the possibilities and implications
  - Research problems for which you lack complete information
 - Get help

(Tomajan & Hatmaker, 2019)
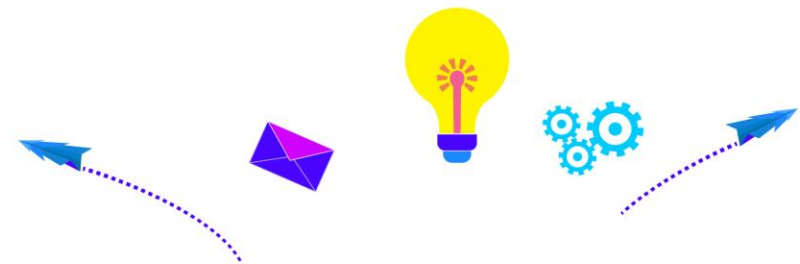
Steps in the Advocacy Process

- Develop a Range of Solutions
  - Weigh advantages and disadvantages of each solution
  - Develop goals, strategies and a plan of action
  - Establish a timeline

- Act
  - Approach decision makers with a compelling request
  - Patience and timing are essential
  - Most advocacy initiatives require a series of actions

  (Tomajan & Hatmaker, 2019)
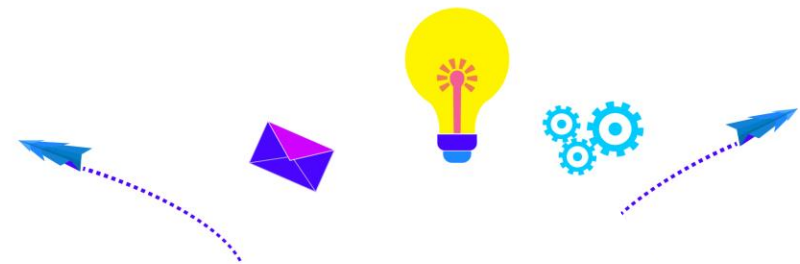
Communication

Advocacy involves bringing individuals and groups together to address the issue

- Communication should be:
  - Clear and concise
  - Message structured to fit the situation and audience
  - Be Factual and consistent – but also…

    Put a human face on the issue – use word pictures to form a compelling message

- Requires the skill of active listening

- Includes verbal, written and electronic formats

Communication Skill: EPIC Elevator Talk

Speak powerfully to decision makers about your recommendation using an "EPIC Laser Talk"

- E – Engage Your Audience
- P – State the Problem
- I – Inform about Solutions
- C – Call to Action

- Practice out loud before using

- Put a human face on the request, tell a story

- Distribute a fact sheet with contact information

Influence

Advocates must be able to influence others in order to facilitate change

- Influence is the ability to alter or sway an individual or group's thoughts, beliefs or actions

- Influence is built on empathy, trustworthiness, competence, and credibility

- Keeping the best interests of those involved builds trust and credibility
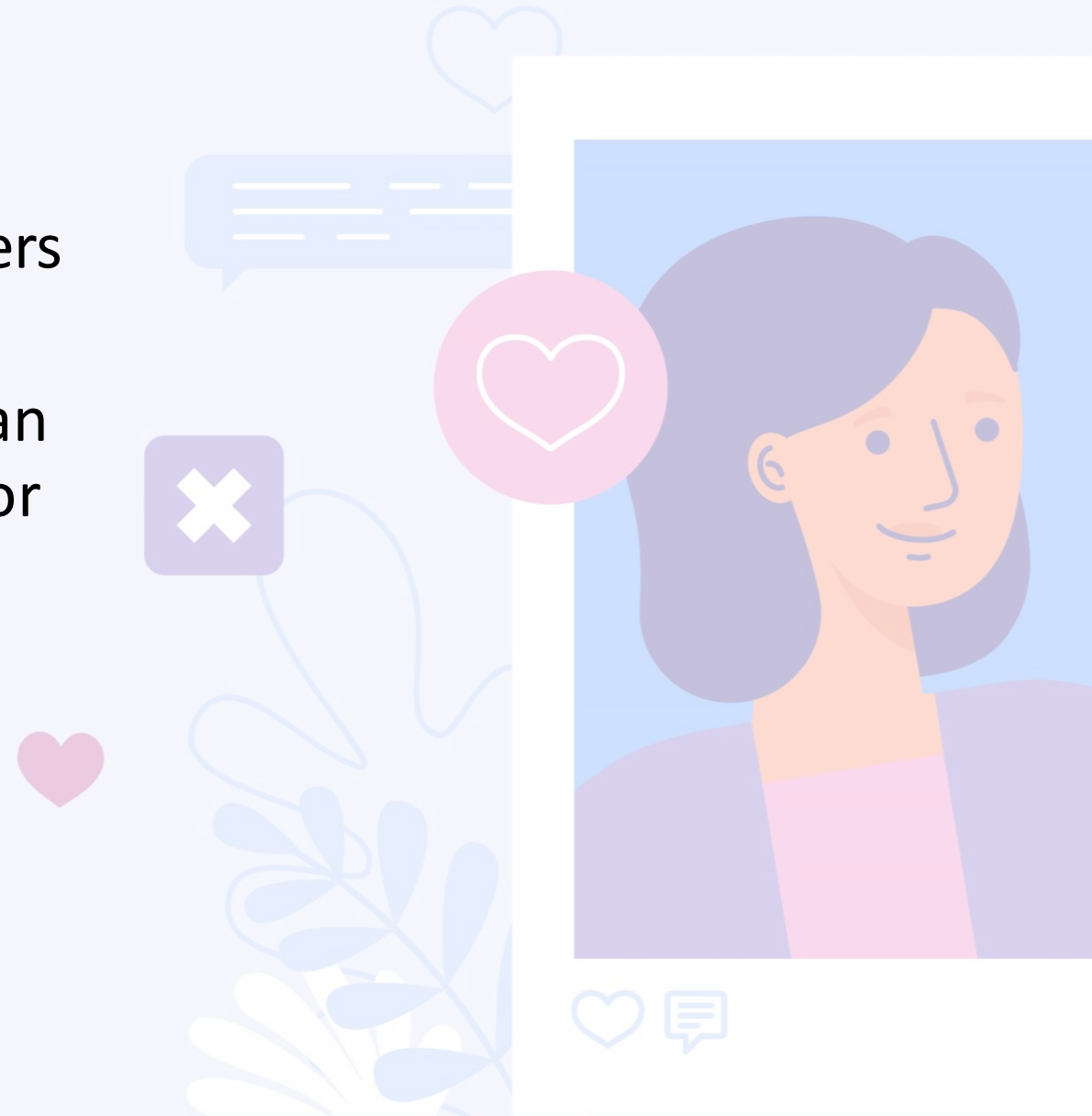
Influence

- Effective advocates influence decision makers:
  - Build a case for the change
  - Back the case with facts and data
  - Use compelling visual images
- Persuasion is a stronger form of influence that makes use of an appeal or argument – it is only effective in small increments
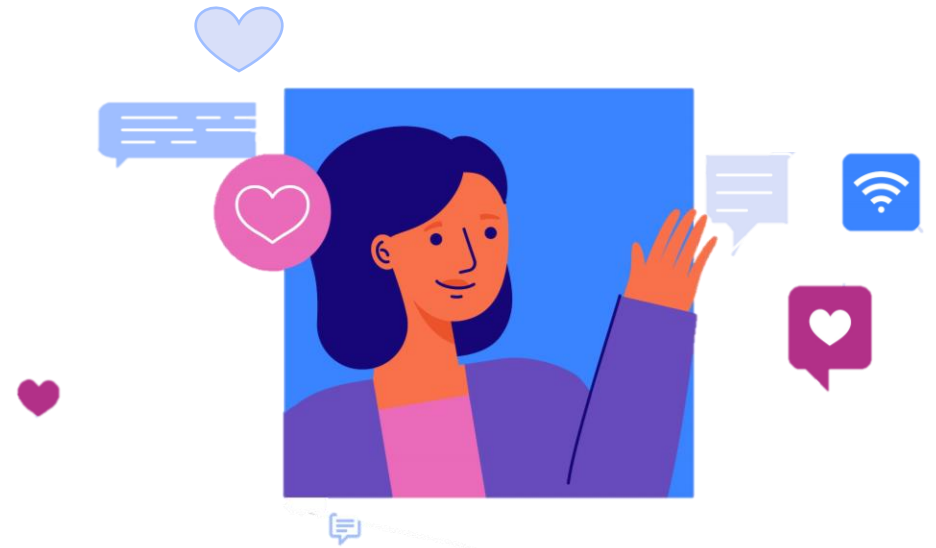
Collaboration

The advocate must be able to establish positive relationships with others to garner support for the issue.

Collaboration is:

- Working with individuals/groups to achieve common goals
- Built on trust, mutual respect, transparency and credibility

- Successful collaboration requires:
  - Careful communication with the groups involved
  - Seeking input when appropriate
  - Ongoing reports on goal progress

Collaboration

- Collaboration may involve collective action with other groups to form collaboratives and/or networks

- Collaboration taps into the talents of others, shares resources and builds momentum

- Collaboration creates an outcome greater than the efforts of a single individual

Resource Identification

The ability to access and use valuable resources is an important advocate skill.

- Resources can include: Information, knowledge, expertise as well as tangibles (supplies, equipment, people)

- Access to accurate information is the basis of advocacy:
    - Assures the issue is fully understood
    - Helps to inform others
    - Ensures preparation to meet with decision makers
    - Reinforces the advocates' credibility

- Information must be credible, current, accurate and evidence based

Searching for Credible Resources

- Evaluate websites, online or other media for:
  - Authority and accuracy - authors credentials and affiliation
  - Purpose and content – point of view of host
  - Does the information align with the evidence?
  - Currency – is the website updated regularly?
  - Organization and ease of use
  - Check out sources that do not seem right
  - Don't take images at face value

(Tomajan & Hatmaker, 2019)

Resource Identification

Credible Resources Include:

- Professional databases
    - PubMed, Cumulative Index to Nursing & Allied Health Literature [CINHAL]

- Professional associations
    - Sigma Theta Tau, International Council of Nurses
    - American Nurses Association, Royal Academy of Nursing
    - Association of Critical Care Nurses, American Pharmacy Association

- Governmental entities
    - Centers for Disease Control and Prevention
    - National Health Service
    - World Health Organization
    - US Veterans Affairs

- Educational Institutions
    - Johns Hopkins University
    - University of Washington

Resource Identification

- Not for Profit or Health Policy Agencies, Foundations, Institutes
    - Institute for Healthcare Improvement
    - Schwartz Center for Compassionate Care
    - Robert Wood Johnson Foundation
    - Johanna Briggs Institute
    - Kaiser Family Fund

- Proprietary Organizations

- Media Organizations

Drivers of the Advocacy Process

Effective advocates do the following:

- Serve the needs of their constituents
- Communicate clearly and memorably
    Well crafted messages (verbal, written and online)
- Collaborate and network with constituents, decision-makers and stakeholders
- Build credibility and generate affinity
- Lay the ground work for initiatives to come
- Build momentum
- Have a sense of timing

Challenges in the Advocacy Process

Advocacy initiatives may be challenged by:

- Inability to build a supportive coalition
- Inability to engage decision-makers
- Lack of timing
- Underestimating the complexity of the issue, solution or decision-making process
- Lack of flexibility or vision with plans to achieve goals
- Unwillingness to collaborate, negotiate or compromise

ADVOCACY IN A TIME OF PANDEMIC

Advocacy in a Time of Pandemic
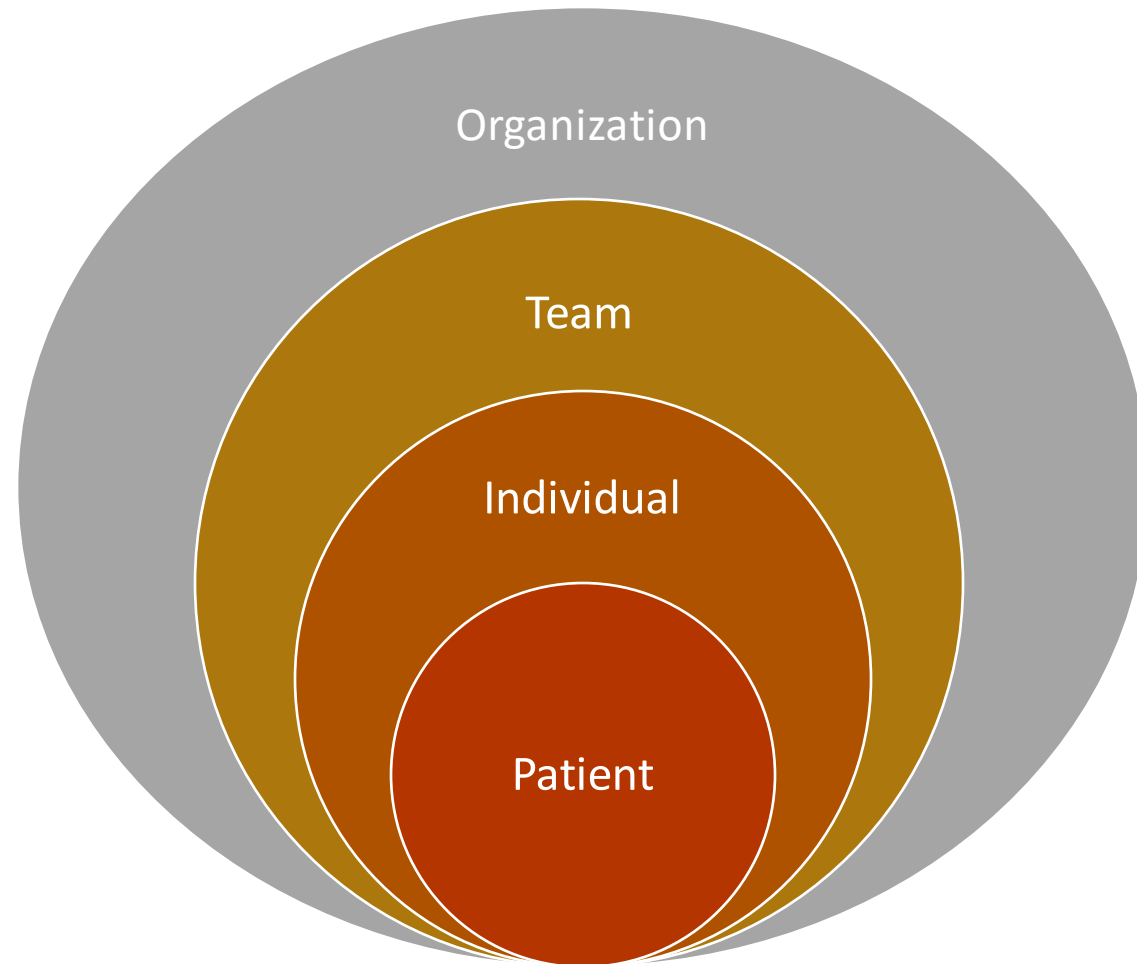
Self Advocacy: Health and Safety at the Individual Level

- Healthcare providers are hardwired to care for others:
  - Reluctance prioritize self care
  - Fear of letting team down or adding to other's workload
  - May need permission/encouragement to address basic personal needs – drinks, food, break, rest
- Maintain open lines of communication with supervisors and leaders
  - Equipment , supply and staffing needs and concerns
  - Training needs
    - Clinical issues related to the virus, patient care modalities
    - How to protect myself and my family
    - Self care strategies
  - Requesting personal support
    - Help with stress or other emotional reactions
    - Family and personal wellbeing concerns
    - Scheduling needs to balance personal needs
  - Recommendations for improving care or team function

Self Advocacy: Health and Safety at the Individual Level

- Manage stress and fatigue to ensure you are able to keep your best self available
  - Maintaining social connections – friends and family, colleagues
  - Self care practices - mindfulness, deep breathing, regular exercise
  - Healthy diet, caffeine and alcohol use
  - Get adequate sleep
  - Take time to unwind
- Accept mental health support during and after the crisis
  - Crises such as pandemics are associated with strong emotional reactions in front line providers.
    - Stress, fear, anxiety, frustration, anger and depression are all normal reactions
    - When coping strategies prove inadequate, talk with a trusted colleague or supervisor
  - Make use of support services early on and following the event
  - Check in with team mates, particularly if withdrawn or you think might not have adequate emotional support outside of work
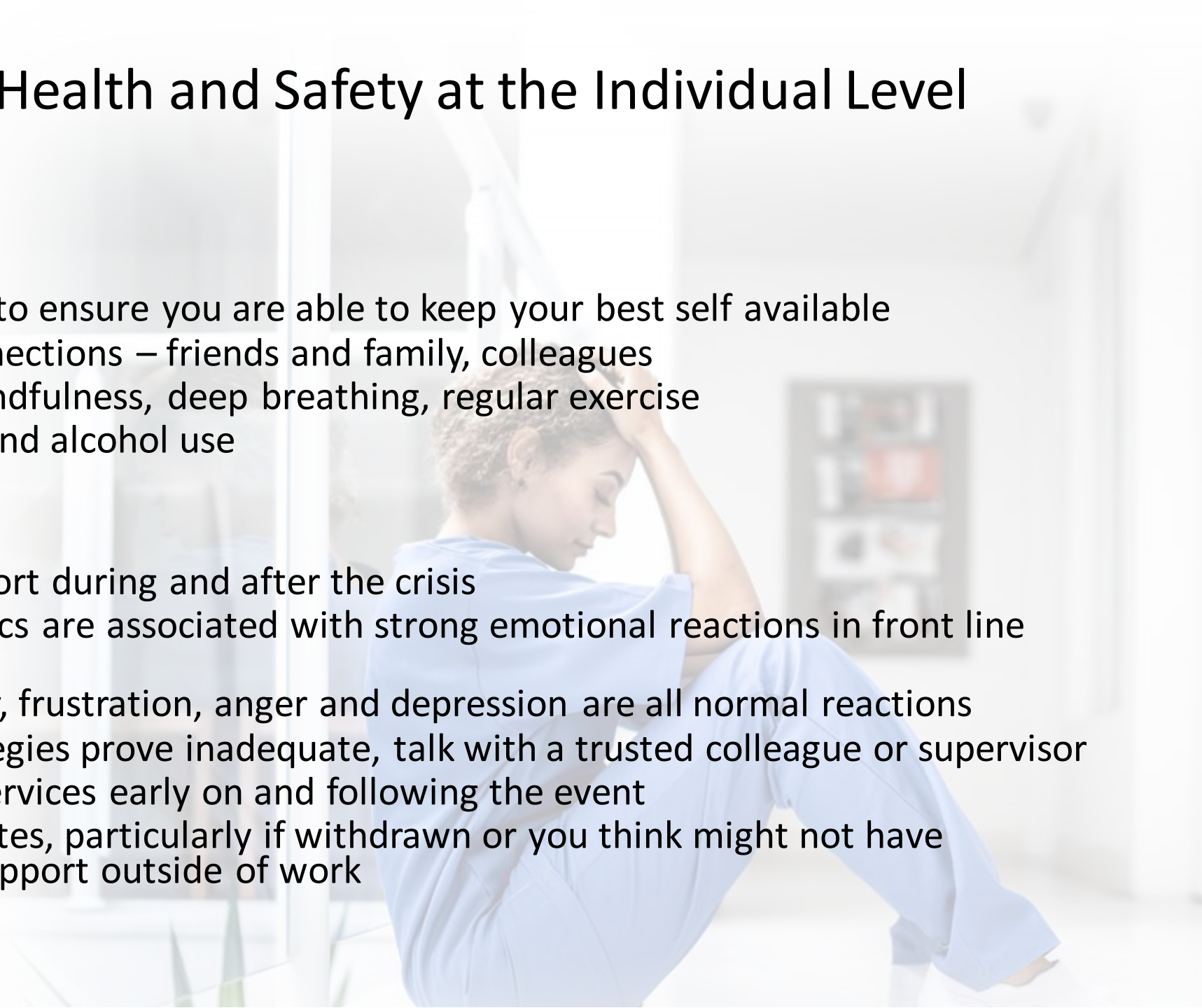
Advocacy for Team Well-Being

- Give colleagues "permission" to address basic needs – food, fluids, breaks, rest
- Monitor how colleagues are doing
  - Are they taking breaks? Meeting basic needs?
  - Do they need to assistance?
  - Monitor each other's workload – coordinate breaks/stress relief activities
  - Monitor the pace of the unit – is there a colleague that is overwhelmed?
  - Are there unidentified learning needs that need to be communicated?
- Touch base regularly with colleagues - email, text, video chat
  - Get to know all of your teammates
  - Reach out to quiet individuals
- Help colleagues who have been out sick or with family members to reintegrate back into team

Advocacy for Team Well-Being

- Support integration of new team members
  - Support with buddy system or assign a preceptor
  - Orient to unit routine, patient population
  - Include new members in all team activities
  - Help to address buddy's learning needs, coordinate with supervisor if needed
- Consider mid-shift team and/or shift end well-being checks
- Identify a shift or unit spokesperson to collaborate with managers on behalf of the team
- Remember your leaders are part of your team and need support. Their emotional reactions also include frustration, anxiety, anger in their work to support their staff.

Leading During a Pandemic

ADVOCACY AS A LEADERSHIP TOOL

Multidimensional Role of the Leader during Crisis

Providing support to staff during a crisis is multidimensional, and requires the ability to address critical, concurrent, competing priorities

- During a crisis the priorities include:
    - Patient and staff safety
    - Staff health and well-being
    - Adequate staffing
    - Appropriate levels of critical supplies and equipment
    - Effective coordination of patient flow
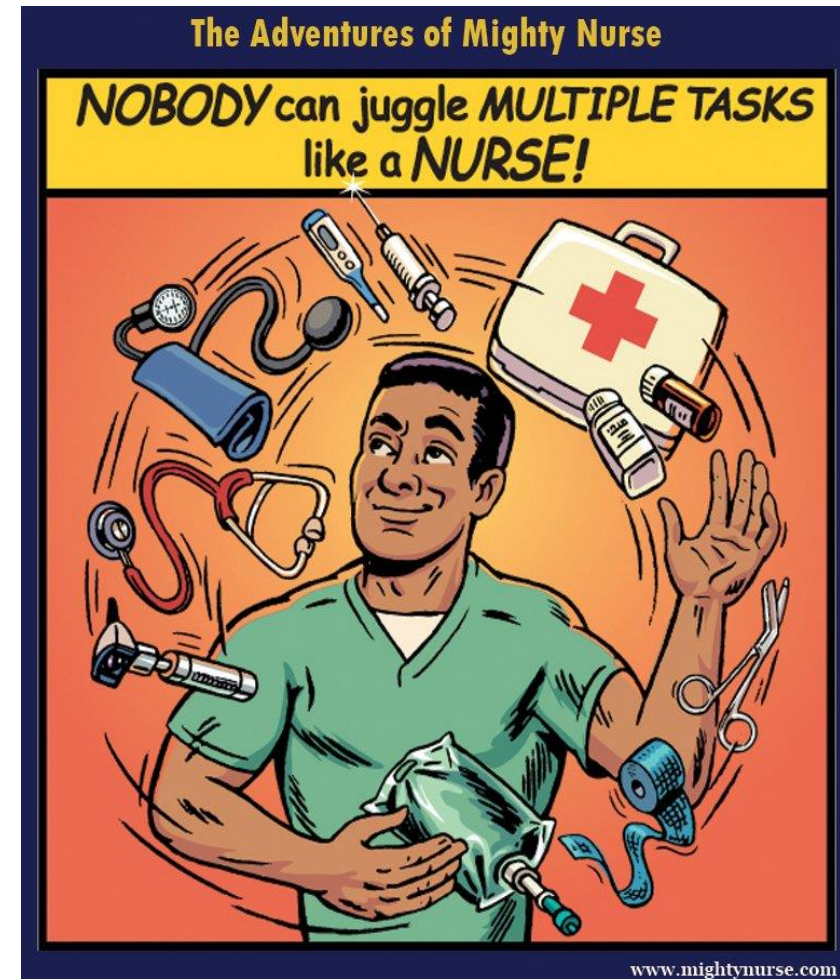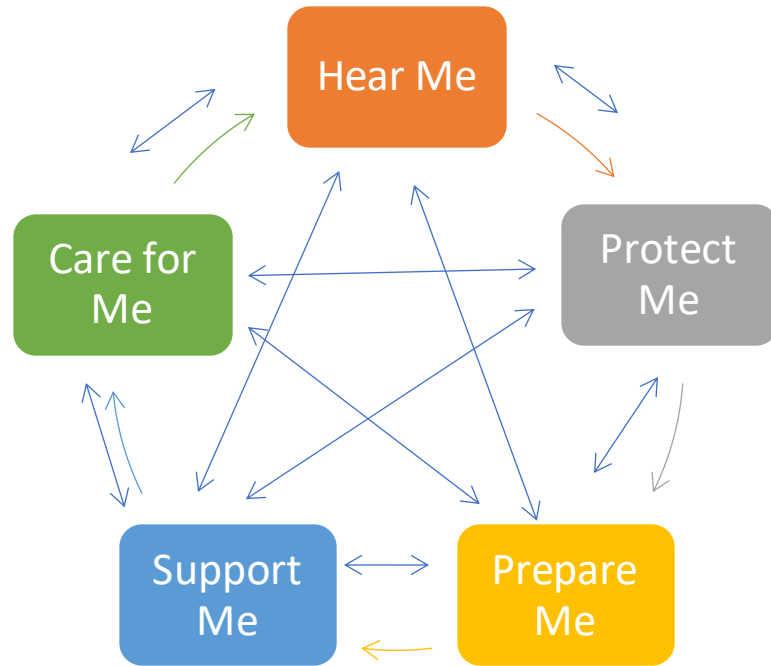   - Monitoring team effectiveness

Health Care Worker Concerns During Pandemic:
An Organizing Framework
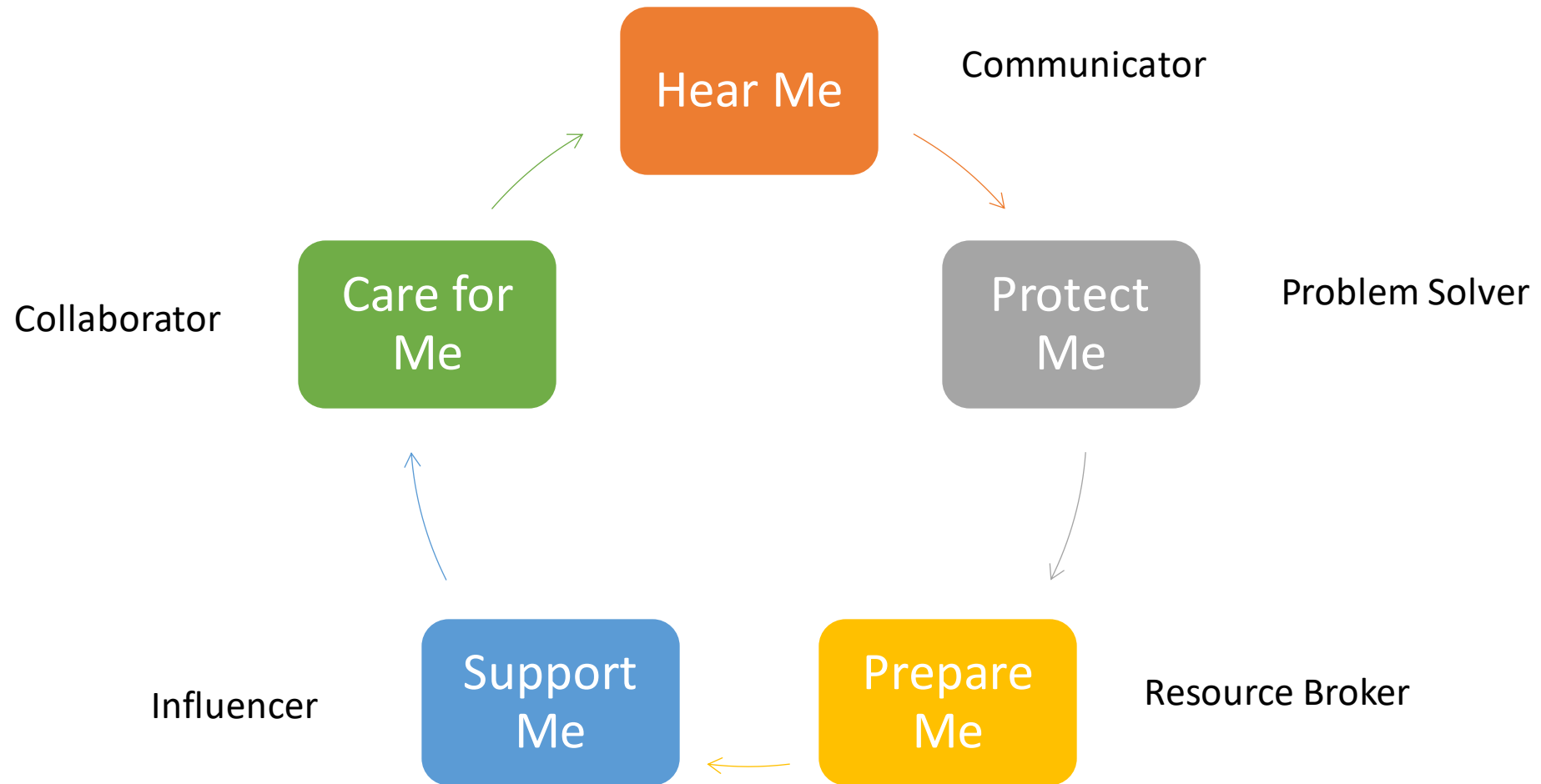
(Shanafelt, Ripp & Trockel 2020)

Multidimensional Role of the Leader during Crisis

Not a linear process – can be overwhelming!

Hear Me

Care for Me

Protect Me

Support Me

Prepare Me

The Adventures of Mighty Nurse

NOBODY can juggle MULTIPLE TASKS like a NURSE!

www.mightynurse.com

Communicate: Hear Me

Listen and act on the expertise of providers, address concerns as leaders and organizations are able:

- Consistent, timely, honest communication is essential in a time of crisis
  - Be visible and accessible at the point of care
  - Communicate support and reduce sense of isolation
  - Listen to staff concerns – (without talking)
  - Provide timely feedback to questions/concerns

- Develop multiple communication channels – huddles, leader rounds, town hall meetings, team emails, blogs, etc.

- Communicate in real time when possible

- Ensure all information is consistent, accurate, current and evidence based

- Ensure voice of staff is represented in decision-making - carry staff concerns and ideas forward, and report back

(Shanafelt, Ripp, & Trockel 2020; Balik, Hilton & White, 2020)

Communicate: Hear Me

- Recognize that individuals respond differently to stress and fear
  - Frustration, anxiety, anger may surface, avoid personalizing as an attack
  - Check-in with quiet or withdrawn team members
  - Empathize with staff and address underlying concerns
  - Promote psychological safety
  - Affirm your availability
- Messages to support staff:
  - "What I hear you saying is…do I have that right?"
  - "What can we do together that would help right now?"
  - "Never worry alone – if you have a question, so do others"

(Shanafelt, Ripp, & Trockel 2020; Balik, Hilton & White, 2020)

Problem Solve: Protect Me

Reduce the risk of acquiring and/or transmitting infection to family:

- Address concerns about availability of equipment and supplies
  - Work to ensure sufficient PPE
  - Ensure access to rapid testing, occupational health services if needed

- Provide resources and training to avoid infecting staff and their families
  - Build sufficient care teams to reduce excessive service demands
  - Prevent exhaustion
  - Provide accommodation to staff at high risk - age or health conditions
  - Keep staff informed of organization policies if infected or transmitted to family

- Be fact based, offer realistic hope

- Focus on what we can control

- Facilitate staff understanding of what is happening to address critical needs

(Shanafelt, Ripp, & Trockel 2020; Balik, Hilton & White, 2020)

Manage Resources: Prepare Me

Provide training and support for high quality patient care

- Promote the competence and confidence of staff
    - Rapid training on managing emerging patient care needs
    - Training and support on providing end of life care
    - Identify training modalities that support the dynamic nature of a novel virus – online, webinars, podcasts, posters, huddles
    - Ensure training content is current and evidence based
    - Provide time to participate

- Provide cross training for staff working outside their area of expertise
    - Expect cross trained staff to require support and supervision
    - Provide safety nets for new team mates – assign support person

- Prepare staff for what they might face and have to do

(Shanafelt, Ripp, & Trockel 2020; Balik, Hilton & White, 2020)

Manage Resources: Prepare Me

- Clear and unambiguous communication. Be fact and evidence based. Types of messaging:
  - "Everyone is experiencing challenges"
  - "We need to rely on each other in this time"
  - "Ask for help when needed, no one should make difficult decisions alone"
  - "We are all in this together"
- Use QI methods to conduct small tests of change, track results

(Shanafelt, Ripp, & Trockel 2020; Balik, Hilton & White, 2020)

Influence: Support Me

Acknowledge demands and human limitations in times of evolving crisis.

- Provide support for physical needs while working
  - Healthy meals, hydration, breaks and rest
  - Assist with lodging needs for staff on back to back shifts
  - Transportation safety for sleep deprived individuals
  - Support for childcare

- Provide support for emotional and psychological needs
  - Self care learning resources to help address: stress, anxiety, depression, anger, insomnia, social isolation, moral distress
  - Access to mental health resources for self referral or leader referral if needed
  - Use evidence based psychological interventions provided by trained and competent staff
  - Be aware that mental health issues may increase during intense stress

(Shanafelt, Ripp, & Trockel 2020; Balik, Hilton & White, 2020)

Influence: Support Me

- Structurally integrate supportive interventions
  - Provide opportunities to talk about experiences at the end of shift
  - Structure time for staff to process, reflect on experiences
  - Allow flexibility for staff affected by stressful events
  - Discuss difficult or upsetting experiences
  - Help to identify/augment coping responses
- Identify mechanisms for safely addressing moral dilemmas
- Recognize the extraordinary efforts of staff
- Be positive and present in as many ways as possible

(Shanafelt, Ripp, & Trockel 2020; Balik, Hilton & White, 2020)

Collaborate: Care for Me

Provide holistic support for the individual and their family if quarantined

- Consider issues of lodging for staff living apart from their families
- Support for tangible needs – food, childcare, check-ins, emotional support
- Address staff concerns regarding salary, healthcare services
- Ensure staff know about resources if they are furloughed
- Find ways for staff to support colleagues who are sick, or have family members who are sick or have died from COVID-19

- Identify what support looks like for the staff and their families

- Mobilize efforts to obtain support

(Shanafelt, Ripp, & Trockel 2020; Balik, Hilton & White, 2020)

Collaborate: Care for Me

- Provide support and foster team spirit and cohesion
  - Encourage informal and formal support mechanisms
  - Ensure effective integration of new team members
  - Support staff providing end of life care
    - Stress of serving as the voice of the family at the end of life
    - Non clinical support staff – involved in transport

- Leaders must support themselves so they have the capacity to support others

(Shanafelt, Ripp, & Trockel 2020; Balik, Hilton & White, 2020; COVID-19 Trauma Response Working Group Rapid Guidance, 2020)

Educators & Advanced Staff Support for the Front Line

- Maintain visibility, round regularly

- Support learning needs of the staff
  - Emergent aspect of learning needs
  - Shortened timeline to intervene

- Ensure continuity and access to current and accurate information across shifts, units, and the continuum

- Support the needs of preceptors and temporary workers

- Maintain ongoing vigilance to the emotional needs of the staff
  - Listen to their experiences, and assist them in processing
  - Help staff to embrace the mental health services available in the setting
  - Keep an eye on quiet or withdrawn individuals, refer to their supervisor

- Serve as a conduit between the staff and leaders

- Empower staff in self advocacy

Beyond Advocacy: Activism as a Means to Advance Goals

As we reflect on the impact this pandemic, we have opportunities at act collectively as health care professional. Activism is an extension of our advocacy work.
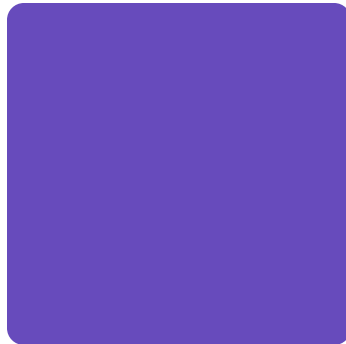
- "Advocacy" and "activism" are often used interchangeably – yet describe different approaches
- Activism is the use of direct actions to advance or oppose a cause
- *Advocacy* is foundational to healthcare provider roles and professional values, *activism* has been viewed with skepticism
- Early health care leaders were activists as well as advocates – Florence Nightingale, Dorthea Dix, Mary Breckenridge, Clara Barton, Lillian Wald, Sister Elizabeth Kenny

Beyond Advocacy:
Activism as a Means to Advance Goals

- Activist actions build on those of advocacy:
  - Telephone calls, letters to legislators, executives, decision makers
  - Letters to the editor, opinion editorials
  - Rallies, campaigns, marches, demonstrations, protests
  - Boycotts, strikes, sit down strikes

- **Important note**: Intentional violence, harm to people or property are never effective in achieving lasting change and are incongruent with professional standards
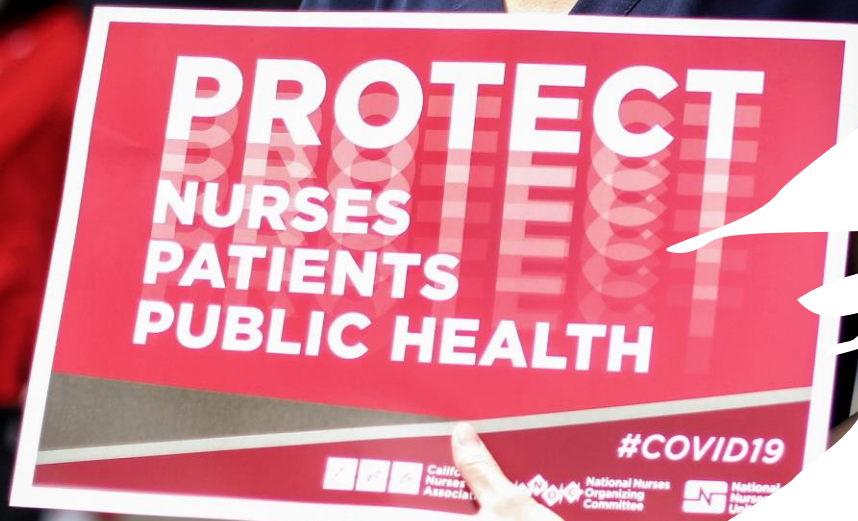
4/13/2020 Photo by Mario Tama – Santa Monica, CA

Beyond the Pandemic: Opportunities for Activism

In the months and years to come, health care providers will need to employ advocacy and activism approaches to improve responses to future pandemics. Opportunities for consideration:

- Equipment/supply availability to support rapid influx of critical patients.
- Processes/practices to ensure physical safety, training, emotional support for workers across the continuum of care
- Engage the voice of the bedside to ensure all perspectives have been heard
- Lobbying for funding to support disaster response
- Public engagement in prevention and early intervention in epidemics
- Greater acceptance and structures for HCP working at the tops of their respective licenses to expand the capacity of the workforce in crisis

Questions? Follow Up?

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Thank you for attending!

- We will send you an email in approximately 1 week that will include a link to the webinar recording and the process for completing the evaluation to obtain your CPD certificate.

- Questions? Email us at: education@sigmanursing.org

- Sign up for future webinars or view previously recorded webinars at: https://www.sigmanursing.org/learn-grow/education/sigma-webinars

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