

Co-designing practice resources to support meaningful inclusion of personal support providers in home and community care teams

The Observe, Coach, Assist and Report (OCAR) framework provides a formal structure to support intentional integration of personal support (PS) providers and their care contributions in home care teams. However, recent research has shown a need for practice resources to facilitate use of OCAR by PS providers in the home. This project will co-design, implement, and test an evidence-based toolkit, to optimize PS practices at the point-of-care and organizational level in two Canadian home care organizations.

“The OCAR framework provides an evidence-based approach to structuring personal support provider practice in a way that amplifies their essential role in the planning and delivery of team-based home care. Uptake of OCAR to guide practice at the point-of-care and organizational levels has the potential to optimize their leadership in person-centred care and improve PS provider job satisfaction, supporting workforce stabilization in the home and community care sector.”

– Nancy Lefebvre, SVP and Chief Operating Officer, SE Health



Project Overview

Many Canadians prefer to live and receive care at home and in their communities as they age.¹ Most paid home care services are delivered by PS providers who support clients' daily activities such as bathing, dressing, taking medications and preparing meals.² Given their frequent, close interaction with clients, PS providers are well positioned to notice changes in client care needs and contribute to team-based care delivery, but are typically excluded from these conversations.³⁻⁵ Intentional and meaningful integration of PS providers and their important knowledge and insights into home care teams is necessary to amplify their leadership in the delivery of person-centred care, improving provider experience, and contributing to the stabilization of this essential workforce.⁶⁻⁸

In collaboration with point-of-care providers and clinical leaders, the **Observe, Coach, Assist and Report (OCAR) framework**⁹ was developed to describe the essential role PS providers play in delivering person-centred, team-based home care. In the OCAR framework, four activity types describing the daily

work of PS providers are defined⁹:

- **Observe:** pay careful attention to, and make pointed inquiries about, client health and social care needs;
- **Coach:** encourage, explain, and/or demonstrate how to complete a given care activity;
- **Assist:** provide verbal and/or physical support to complete care-related tasks;
- **Report:** notify care team members about important observations related to client care needs.

In a recent survey, staff working in the PS program at a large home care organization in Ontario reported on current uses and discussed future opportunities for OCAR to structure PS provider work.¹⁰ Survey participants reported that OCAR was extremely relevant to their daily practice, and identified many opportunities for expanded use including improving knowledge about the PS provider role; establishing clear care expectations; and supporting client care consistency and intra-/inter-professional communication. Participants also identified a need for consistent and ongoing education about how to use OCAR, in addition to better integration of OCAR with existing practices and processes.

What are we doing?

As part of our research portfolio investigating Health and Care Experiences, we are partnering with two Ontario home care organizations to co-design and test an OCAR toolkit with pragmatic resources to help structure PS practice in home care. In this project we will also develop and test implementation processes to facilitate planned spread and scale of the toolkit. Guided by the Participatory Research to Action (PR2A) framework¹¹ and an advisory committee of experts-by-experience (e.g., point-of-care providers, home care leadership), this study will involve four objectives:

1. Explore, synthesize, and compare evidence of, and opportunities for, alignment of current PS home care practice and OCAR type activities;
2. Co-design an OCAR Toolkit and supporting processes with experts-by-experience in PS practice;
3. Develop tailored organization-level action plans to implement the toolkit and processes; and
4. Implement and test the toolkit and processes for feasibility and experience outcomes.

The project will include key informant interviews, document analysis, co-design workshops, feedback fairs, and a pilot and feasibility study.

What will we find?

Using the key informant interviews in Objective 1, we will develop an **OCAR Practice Guidance Framework** with four components, including communication (e.g., emails, meetings), documentation (e.g., progress notes, care plans), education (e.g., orientation, training of clients/family), and governance (e.g., policy, procedures). Document analysis will be used to examine practice guidance materials at both home care organizations to summarize current OCAR practices and potential uses in an **OCAR Practice Landscape Report**.

Objective 2 will engage PS provider, manager, and practice leaders in co-design workshops, generating ideas, blueprinting promising components, and testing prototypes, to produce the **OCAR Toolkit** with

standardized resources and supporting processes to structure PS practice in team-based home care.

In Objective 3, an **Implementation Guide** and **Organizational Action Plans** will be developed to guide pilot and feasibility testing. Participants with practice, operations, and organizational expertise will be engaged in feedback fairs to identify important logistics and context considerations that may affect implementation of the OCAR Toolkit.

Finally, in Objective 4, an exploratory pilot and feasibility study of the OCAR Toolkit will assess preliminary adoption, feasibility, and acceptability outcomes at both home care organizations.

What are the next steps?

It is anticipated that at the end of the project, useful and tangible resources to support the integration of OCAR into PS practice will be available for future spread and scale to other home care organizations.

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To learn more about this work

Observe, Coach, Assist, and Report: An Emerging Framework for Integrating Unregulated Healthcare Providers into Interdisciplinary Healthcare Teams



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References

