

STEP 2

Plan the Campaign

- *Review what was done last year.*
- *Ask, "What can be done better this year?"*
- *Work with the team to organize the campaign.*

	Action Items	Resources in this Kit
①	Build a multi-disciplinary team.	Tips on Team Building and Facilitating Meetings
②	Assess last year's efforts.	Assessment Worksheet
③	Prepare for the campaign.	Strategies for Obtaining Organizational Commitment
④	Implement the campaign.	<ul style="list-style-type: none">• Prior to the Clinic: Things to Consider• Pre-Clinic Preparation Tasks
⑤	Order campaign materials.	Order Form (located behind Step 5)

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Tips on Team Building and Facilitating Meetings

Team Building

It is useful — even in a small health care facility — to bring together a multi-disciplinary team to help plan and implement an employee immunization campaign. While it may take more time in the beginning, a team can provide broad insights into reaching employees and providing education, especially regarding some of the myths surrounding immunizations. The team members can also help to review the clinic action plan, recruit employees in various units of the facility to obtain a flu immunization, and staff the clinics.

When organizing a team, consider having representatives from across the facility, including administration, public relations, clinical staff, dietary, and housekeeping. Think about which employees others look up to and whose opinion is respected, and see if they will join the effort. Remember, the team will be called upon for a number of seasons to come.

Key Team Members

Three key roles need to be considered when assembling a team, and it's helpful to assign these roles after speaking with team members. Except for the role of team leader, roles can change hands regularly or be structured so they rotate among team members.

- **Team Leader:** This person will serve as the project's champion. This individual should understand how to effect change and have some leverage within the organization.
- **Meeting Facilitator:** This person should know how to run meetings effectively and be able to maintain a distance from the discussion in order to keep the meeting focused.
- **Recorder:** This person should be able to keep and communicate minutes, record decisions, and maintain master files of all resource materials.

Keys to Effective Teams

There are six key ways to ensure an effective team:

- **Clarify goals and objectives.** A lack of clarity can lead to misunderstanding. Identify the project's goal(s) and specific objectives in all internal communications. Also, repeat them at meetings and refer back to them as needed to maintain the team's focus.
- **Clarify roles.** Be sure all members understand the team's objectives and their individual roles. Clarify roles for new team members. Develop a formal written statement regarding the goals and objectives of the project, and roles of team members. Do not to assume everyone knows what's happening or who is responsible for specific activities.
- **Clarify support.** Be clear from the outset what support the team can expect, and who will provide it.
- **Exhibit leadership and promote participation.** Prepare for meetings. Develop a written agenda specifying discussion points and decision points. Encourage balanced participation and keep the discussion focused on the agenda.
- **Manage conflict.** Establish a rule for resolving disputes when they arise. Try to anticipate areas of disagreement. Determine how decisions will be made.
- **Celebrate successes.** Take time to periodically celebrate successes — they are often hard won. When appropriate, recognize the work of individual team members.

Facilitating Meetings

Below are a few simple, but critical elements to facilitating a team meeting:

- Welcome everyone. Do not assume everyone knows each other. Ask team members to introduce themselves and describe their work and interest in being on the team.
- Post ground rules about decision-making and how discussions will take place.
- Have a prepared agenda; review the agenda and objectives at the start of the meeting. Ask if there are any additional items that need to be discussed.
- Stick to the agenda. Note any new issues that arise, but unless they are pertinent, hold them for another meeting.
- Bring closure to all agenda items.
- Encourage participation. Draw out opinions, but do not take sides. Do not allow one or two members to dominate the discussion. (Hint: If some members are not engaged in the discussion, ask around the room for everyone's opinions.)
- Summarize a member's comments to be sure participants understand the point(s) being made.
- When a decision is made, be clear as to who will be responsible and when the task will be completed.
- Before ending, summarize the results and review decisions and follow-up work, including who is responsible.
- Thank all participants.
- Send out a summary of each meeting to all participants. A good summary will include the decisions made, who agreed to do the work, and when tasks will be completed.
- Begin the next meeting by reviewing past discussions and decisions. Do not assume that all team members will remember what was discussed.

Assessment Worksheet

Review previous efforts and identify ways to improve.

Assessment of Last Year's Efforts	Ways to Improve Upon Last Year's Efforts
<p>1. Number of employees immunized last year: _____</p> <p>If you do not know last year's immunization rate: How much vaccine did you purchase for your employees last year? _____ doses</p> <p>Did you have enough?</p> <p><input type="checkbox"/> Yes. Consider setting this year's immunization goal at 110% of last year.</p> <p><input type="checkbox"/> No. Consider purchasing 20% more than last year.</p>	
<p>2. Which departments or disciplines had the least number of staff members getting the flu shot (e.g., physicians, nurses, housekeepers, maintenance workers, aides, dietary staff, etc.)?</p> <p>Were these groups represented on the Planning Committee?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	
<p>3. Did you have a multidisciplinary strategic planning team?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	
<p>4. Methods used to administer vaccine:</p> <p><input type="checkbox"/> Kick-off <input type="checkbox"/> Stationary clinic <input type="checkbox"/> "Rolling cart" clinic</p> <p><input type="checkbox"/> Other _____</p>	
<p>5. Tools used for campaign promotion and staff education:</p> <p><input type="checkbox"/> Flyers <input type="checkbox"/> Posters <input type="checkbox"/> E-mail</p> <p><input type="checkbox"/> Employee newsletters</p> <p><input type="checkbox"/> In-service training <input type="checkbox"/> Pay stuffers <input type="checkbox"/> Other _____</p>	
<p>6. Incentives or rewards for staff who obtained immunization:</p> <p><input type="checkbox"/> Departmental competition <input type="checkbox"/> Refreshments</p> <p><input type="checkbox"/> Raffle <input type="checkbox"/> Games <input type="checkbox"/> Other _____</p>	
<p>7. Methods used to track your immunization progress:</p>	
<p>8. Evaluation of your immunization campaign:</p> <p>Strengths:</p> <p>Weaknesses:</p>	

Strategies for Obtaining Organizational Commitment

A number of critical strategies should be implemented to ensure that a high percentage of employees get immunized. These strategies begin with organizational commitment.

Develop a Policy

If the facility does not have a formal policy on HCP immunization, develop one, have it approved, and disseminate it to all employees. The following steps will help you create an effective policy:

- Indicate who should be immunized, why, and when. (See Step 1 of this kit.)
- Include a detailed goal, such as reaching the Healthy People 2010 goal of 90 percent immunization.
- Make the policy available to all employees and contract workers. (Note: If feasible, extend the policy to all visitors of the facility.)

The policy can also be used as a “teaching moment” to educate leadership and staff on the importance of this issue.

More detailed information on immunization policies and procedures can be found at www.apic.org/Content/NavigationMenu/PracticeGuidance/Topics/Influenza/TemplatePolicyStatement.doc.

Educate Staff

Many employees still do not understand that if they do not get a flu vaccination, they are not only putting their health and their family's health at risk, but they are putting the health of their patients at risk.

Educational training programs can be found at www.apic.org/Content/NavigationMenu/PracticeGuidance/Topics/Influenza/InfluenzaPresentation.ppt and www.cdc.gov/nip/ed/video_selfstudy.htm.

Make the Vaccine Available

To make vaccination convenient for HCP, purchase a sufficient supply of vaccine and provide the immunizations on-site. This will decrease some of the well-documented barriers cited by staff as to why they do not get a flu vaccine.

For more information on flu vaccine availability, visit the Massachusetts Department of Public Health's website, www.mass.gov/dph.

Prior to the Clinic: Things to Consider

Increase Access

In addition to having a central flu clinic, immunizations can be significantly increased by offering the vaccine at locations throughout the facility.

- One of the most successful strategies for immunizing HCP is to use a "rolling cart." The cart should contain all the supplies needed to immunize staff at the workstations.
- In addition to planning specific clinics, encourage staff to drop by the employee health office for a flu vaccination at their convenience. Be sure to keep supplies on hand for the drop-ins.

Determine Staffing

Think about how many people will be needed to staff the clinic(s), identify those who will help, and make sure they understand their responsibilities. Determine whether or not interpreters/translators will be needed.

Obtain Standing Orders

Standing orders should be obtained for employee immunization programs to allow staff nurses to provide the vaccine. Most health care providers use standing orders for immunizing patients, and the same process should be used for employee immunization.

Model standing orders can be obtained from the MDPH "General Protocols for Standing Orders" at www.mass.gov/dph/cdc/mso/proto.pdf, "Model Standing Orders for TIV" at www.mass.gov/dph/cdc/mso/fluso.pdf, and "Model Standing Orders for LAIV" at www.mass.gov/dph/cdc/epii/flu/laiv.pdf.

Be Mindful of Informed Consent

Informed consent is not required, but many organizations like to have anyone who receives a vaccine sign a consent form. The consent form and the Vaccine Information Statement (VIS) can be distributed beforehand for employees to review, and if needed, to sign. See "Supplies" for Web links to VIS forms, or visit www.immunize.org/vis/.

Determine Supplies

Determine the number of employees to be immunized, and have all necessary supplies on hand. (See supply checklist under "Pre-clinic Preparation Tasks.")

Review Proper Vaccine Storage and Handling

Review guidelines for proper vaccine storage and handling at www.immunize.org/catg.d/p3035chk.pdf, and "Maintaining the Cold Chain During Transport" at www.immunize.org/catg.d/p3049.pdf.

Use Roster Sheets

Have employees sign up in advance to be vaccinated, particularly when vaccine will be provided on specific units. Roster sheets help determine the amount of vaccine and supplies needed. These sheets can also be used to determine which staff have not signed up, and the team can encourage those staff to do so.

Focus on Publicity

- Publicize the clinic(s) through staff newsletters, pay stubs, blast e-mails, posters, and flyers. Prepare a statement, signed by key staff, to be read at department meetings.
- Begin the educational campaign approximately a month before starting the clinics. (See Step 3.)
- Endorsements by key staff (e.g., the medical director, CEO, administrator) can be very helpful.

Offer Incentives

Consider offering incentives to HCP who get immunized. Suggestions include weekly raffles of a "free" day off or gift certificates for lunch or dinner. Create friendly competition among units or floors to achieve the highest rates, and reward the winner with a prize such as a pizza luncheon.

Pre-Clinic Preparation Tasks

Use Reminders

If possible, send a reminder e-mail message to HCP the day before the clinic.

Supplies

Prepare the supplies in the clinic area (or on the cart) well before the start of the clinic. (Some employees may decide to get there early.)

Checklist:

- Syringes (appropriate needle gauge and length; quantity to match number of doses)
- Alcohol swabs
- 1" gauze pads and/or cotton balls
- Bandages
- Biohazard "sharps" disposal containers
- Trash cans and liners
- Gloves — disposable, single-use. Gloves are not required when administering vaccines unless there is potential for exposure to blood and body fluids, or the health care provider has open hand lesions. *If at all possible, avoid using latex gloves at clinics.*
- Hand sanitizer solution. Hands should be washed before each patient is immunized.
- Paper tablecloths

- Vaccine in an insulated container with a cold pack covered with a paper towel and a thermometer, temperature log, and pen. Keep track of the vaccine temperature at least every two (2) hours. Refer to the package insert for LAIV storage, handling, and transport.
- VISs, standing orders, Vaccine Administration Record for Adults, and screening questionnaires. Adult immunization record cards can be found at www.immunize.org/adultizcards/index.htm or by calling the MDPH Massachusetts Immunization Program at (617) 983-6800.
- Paper, pen, large manila envelopes, and other office supplies as needed

Plan for Data Collection and Analysis

Arrange to have all data related to who received a flu shot organized and stored for later tabulation and analysis. (See the "Vaccination Tracking Form" in Step 4.)

It would also be helpful to collect information on why some HCP refused to get vaccinated. This information can be used to design next year's educational program.