**Templated CARD surveys for implementing staff**

**This document contains five surveys as described below. These documents can be found at CardSystem.ca.**

* **CARD implementation staff attitudes survey 2**

This survey for staff is used to better understand what is currently happening in their practice setting, how the staff feels about their work environment and what their current beliefs are regarding the CARD System. It can be used repeatedly to identify targets for intervention and track changes over time.

* **CARD health-care provider behaviours survey (overall or vs. usual practice, depending on role) 4**

This survey is used to understand how implementing the CARD System changes the behaviour of the health-care provider and how they interact with the patient. The survey also asks about changes in client behaviour when the CARD System is implemented in the practice setting.

* **CARD knowledge ‘check-in’ survey 6**

This survey is used to check the knowledge of staff regarding different coping strategies that are used to reduce the pain and fear (stress responses) associated with needle procedures.

* **CARD staff debrief survey 7**

This survey is used to share what went well and what didn’t during the vaccination clinic and what they can do differently in the future.

* **CARD semi-structured interview guide 8**

This interview guide is used to run a focus group discussion after staff have completed CARD training and/or implementation whereby they can share knowledge, beliefs, attitudes and practices. It can be used repeatedly to identify targets for intervention and track changes over time.

## CARD implementation staff attitudes survey

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Stronglyagree** | **Agree** | **Neutral** | **Disagree** | **Stronglydisagree** |
| **Attitudes about patient comfort** |  |  |  |  |  |
| It is important to treat fear and pain during needle procedures |  |  |  |  |  |
| Fear and pain during needle procedures can have a negative effect on patients |  |  |  |  |  |
| Patients should be given information about how to make needle procedures more comfortable |  |  |  |  |  |
| Parents/caregivers should be given information about how to make needle procedures more comfortable |  |  |  |  |  |
| Providers/staff should be given information about how to make needle procedures more comfortable |  |  |  |  |  |
| Patients should be given the opportunity to choose how they want to cope during needle procedures |  |  |  |  |  |
| Supporting patient coping choices during needle procedures is an important part of providing patient-centred care |  |  |  |  |  |
| Getting feedback from patients about their feelings and experiences during needle procedures is important  |  |  |  |  |  |
| The best way to know how much fear or pain a patient is in is to ask them |  |  |  |  |  |
| **Attitudes about work environment** |  |  |  |  |  |
| The department staff work together as a well-coordinated team |  |  |  |  |  |
| I experience good collaboration with other department staff |  |  |  |  |  |
| I experience good collaboration with patients and families |  |  |  |  |  |
| Meetings are regularly performed in my department to discuss work processes |  |  |  |  |  |
| I value meetings in my department to review work processes |  |  |  |  |  |
| It is easy for staff to ask questions when they do not understand something |  |  |  |  |  |
| I regularly provide input during meetings in my department |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Stronglyagree** | **Agree** | **Neutral** | **Disagree** | **Stronglydisagree** |
| **Attitudes about The CARD System** |  |  |  |  |  |
| The CARD system is aligned with national professional standards |  |  |  |  |  |
| The CARD system is aligned with our organizational (and clinic) goals |  |  |  |  |  |
| I understand the individual components of the CARD system |  |  |  |  |  |
| I believe the CARD system is being used in my practice setting |  |  |  |  |  |
| I am confident in my ability to use the CARD system |  |  |  |  |  |
| I am willing to try all components of the CARD system |  |  |  |  |  |
| Management supports my daily efforts in implementing the CARD system |  |  |  |  |  |
| I have the support I need from other staff to implement the CARD system |  |  |  |  |  |
| I believe that the CARD system improves how needle procedures are planned and carried out |  |  |  |  |  |
| I believe that the CARD system improves the patient experience during needle procedures |  |  |  |  |  |
| I believe that the CARD system improves staff experiences during needle procedures |  |  |  |  |  |
| I believe that the CARD system improves collaboration between staff and patients |  |  |  |  |  |
| I believe that the CARD system improves collaboration among staff in my practice setting |  |  |  |  |  |
| I believe that the CARD system helps to promote patient-centred care |  |  |  |  |  |
| I believe that using the CARD system adds time to needle procedures |  |  |  |  |  |
| I think it is realistic to continue to use the CARD system in my practice setting |  |  |  |  |  |
| I am likely to continue to use the CARD system in the future |  |  |  |  |  |
| I would recommend the CARD system for needle procedures in my practice setting |  |  |  |  |  |

**Health-care provider behaviours survey (overall or vs. usual practice, depending on role)**

|  |  |  |
| --- | --- | --- |
|  | **Overall** | **Vs. usual practice** |
| **Education and Environment**  | **Yes** | **No** | **Less** | **Same** | **More** |
| Educate patients about CARD ahead of time (via website and/or during appointment booking) |  |  |  |  |  |
| Educate parents/caregivers about CARD ahead of time |  |  |  |  |  |
| Educate patients about CARD on procedure day (via posters, CARD checklist, pamphlets, CARD web game) |  |  |  |  |  |
| Educate parents/caregivers about CARD on procedure day  |  |  |  |  |  |
| Provide distraction items/activities in all clinic areas (waiting, procedure, and aftercare area) |  |  |  |  |  |
| Minimize fear cues, both auditory (close doors, play calm music) and visual (cover/conceal sharps container, needles) |  |  |  |  |  |
| Encourage people to get comfortable and ready for the procedure by removing extra clothing such as coats |  |  |  |  |  |
| Provide privacy (separate room with door closed) during procedure |  |  |  |  |  |
| Allow seating for patient and support person in all areas  |  |  |  |  |  |
| Arrange seating so that patient is facing distraction items/activities instead of equipment and/or health-care provider |  |  |  |  |  |
| **Engagement with patients** | **Yes** | **No** | **Less** | **Same** | **More** |
| Invite patients to complete CARD checklist (to elicit coping preferences, level of fear of needles, and history of dizziness/fainting during needles)  |  |  |  |  |  |
| Screen patient responses to CARD checklist and other documentation available to prepare for the needle procedure  |  |  |  |  |  |
| Confirm patient coping strategies/accommodations |  |  |  |  |  |
| Invite other highly qualified staff (e.g., Child life specialist) to assist when procedures are expected to be complicated |  |  |  |  |  |
| Avoid interruptions during procedures |  |  |  |  |  |
| Use language that promotes coping |  |  |  |  |  |
| Invite patient to ask questions |  |  |  |  |  |
| Hide/conceal needles and other visual fear cues from view  |  |  |  |  |  |
| Sit beside patient during procedure |  |  |  |  |  |
| Ask patient to keep arm loose and still |  |  |  |  |  |
| End appointment on a positive note |  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
|  | **Overall** | **Vs. usual practice** |
| **Patient behaviours** | **Yes** | **No** | **Less** | **Same** | **More** |
| Use distraction items/activities from home |  |  |  |  |  |
| Use distraction items/activities from clinic |  |  |  |  |  |
| Use topical anesthetics |  |  |  |  |  |
| Have a support person present (e.g., parent/caregiver, friend) |  |  |  |  |  |
| Sit on parent’s/caregiver’s lap |  |  |  |  |  |
| Use muscle tension exercise |  |  |  |  |  |
| Undergo procedure while lying down |  |  |  |  |  |
| Ask questions about procedure |  |  |  |  |  |
| Ask questions about coping strategies/accommodations |  |  |  |  |  |
| Leads their coping selections during the needle procedure (i.e., plays their own CARDs rather than provider-directed coping selections) |  |  |  |  |  |
| **Evaluation** | **Yes** | **No** | **Less** | **Same** | **More** |
| Patient and parent/caregiver feedback collected (via surveys) |  |  |  |  |  |
| Staff feedback (via surveys, debriefs, meetings) to inform future practices |  |  |  |  |  |

**CARD knowledge ‘check-in’ survey**

Needles can cause pain. Also, we know that some people are afraid or worried about needles.Tell us if you think any of the ways described below can help to make needles more comfortable for people, either by making the needle hurt less, or by making it less scary.
Put a checkmark ( √ ) for “Yes” or “No” or “Don’t know” for each of the statements *and* explain your answer.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Tell us if these ways might help make needles more comfortable, either for you OR someone else** | **Yes** | **No** | **Don’t know** | **Explain why you think it works or doesn’t work** |
| Have someone with you like a family member or a friend  |  |  |  |  |
| Have privacy so people cannot see you getting the needle |  |  |  |  |
| Use medicine to numb the skin so you don’t feel the needle |  |  |  |  |
| Distract yourself so you are paying attention to something else  |  |  |  |  |
| Relax by taking deep belly breaths to help you stay calm |  |  |  |  |
| Ask questions so you know what will happen |  |  |  |  |
| Relax your arm so that it is jiggly (like cooked spaghetti/noodles) |  |  |  |  |
| Sit down in a comfortable position  |  |  |  |  |
| Look away from the needle so you do not see it |  |  |  |  |
| Make your legs and tummy muscles tight (or tense) so you don’t feel dizzy |  |  |  |  |

**CARD staff debrief survey**

Post-clinic debriefing sessions provide opportunities for staff to share successes and challenges and empower them to help each other learn from their experiences. Reflect on the way needle procedures are carried out in your practice setting by using these questions as a guide. Include feedback from patients and parents/caregivers when answering the questions to ensure their perspectives are captured and considered. This will require reviewing/collating their feedback before answering the questions.

1. What went well and why?

1. What didn’t go well and why?

1. Did the team work productively together?

1. What can we do differently to make it even better next time?

**CARD semi-structured interview guide**

This interview guide can be used as a template to obtain feedback from implementing staff about CARD. Consider the staff’s role in the organization when analyzing results.

You all completed CARD training (and/or implementation, as appropriate). Today, I am going to ask you some questions about your experiences and perceptions of CARD. Since I’m asking for your point of view, there are no right or wrong answers. This is not a test – just tell me what you think. Remember, we will keep your answers private. It’s okay if you don’t know the answer to a question or if you don’t want to answer a question. If you don’t understand something I said, please ask me to explain it better. I will be reading from this manual to make sure that I ask all my questions.

Now think back to when you were completing the CARD education (and/or implementation, as appropriate):

1. What do you remember about it - What was included in it? *[PROMPT: Are there any tools that you remember?]*
2. What did you learn from it?
* What was most useful about it? What was least useful?
1. How have you integrated CARD in your clinical practice?
* What aspects/parts of CARD did/do you use? How have you incorporated them in your vaccination processes?
1. How easy do you think CARD strategies are to use? How well do you think they work in your practice setting?
	* How confident are you that you can use these techniques when carrying out needle procedures?
		+ How does/would using these strategies impact on your interactions with patients and families?
		+ How effective are these strategies for reducing stress-related responses in your patients, such as fear and pain?
	* How does/would using these strategies impact your interactions with clinic staff?
		+ How does/would using these strategies impact on your workflow?
	* How does/would using these strategies impact on you and your satisfaction with your professional role and responsibilities?
2. What supports do you need to help you to use CARD in your practice setting? How does the current infrastructure (size, working relationships between individuals/social architecture, physical layout, type of staff – full/part-time, training) affect your ability to integrate these strategies and processes?
3. Thinking back to your education about CARD:
* How easy was it to learn? *[PROMPT: specifics of teaching strategies – information layout, cases, quizzes, quantity of info, etc.….]*
* What do you think could be done to enhance the CARD education (and/or implementation, as appropriate)?
* What would you recommend to help others learn about and do CARD?
1. How do you use CARD today? *[PROMPTS: How/who do you use it with? Do you refer back to certain tools? Which ones do you refer back to?
If you do not use CARD now, what prevents you from using it?]*
2. How do you plan to use CARD in the future? *[PROMPTS: What did you learn from it? How will others influence your ability to use it?]*
3. Is there anything else you want us to know? *[PROMPTS: Do you have any specific suggestions going forward? How do you want to help?]*