

Self-Assessment Tool for the Competency Framework of the Interprofessional Comprehensive Geriatric Assessment

November 15, 2018

RGP Project Team

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Introduction

The self-assessment tool is a living document that is meant to support the clinician to adequately prepare themselves to deliver interprofessional comprehensive geriatric assessment and interventions by supporting the on-going growth and development of the core competencies outlined in the “A Competency Framework for Interprofessional Comprehensive Geriatric Assessment”¹. Self-assessment is integral to lifelong learning. It is beneficial to elicit feedback from a mentor and/or a supervisor when identifying learning needs and setting goals².

The three sections of this tool help to identify clinical strengths and areas for growth and development:

1. The Self-Assessment Tool: The clinician rates their knowledge, skills and abilities for each practice area and behavioral statement; indicates if this is an area for professional development and indicates when this will be followed up on; and provides the opportunity to detail at least one example per practice area that demonstrates how the competency is integrated into their practice.
2. Summary Sheet: The clinician indicates in which area(s) they will focus their learning.
3. Action Plan: This template supports the clinician to detail action steps for each Skill and/or Competency that they want to develop.

These tools have the following potential uses:

1. Provides the foundation for geriatric assessor professional development.
2. Documents current competencies.
3. Identifies individual learning needs.
4. Guides orientation of new staff.
5. Formalizes an annual learning plan to identify areas for professional development.
6. Offers a framework for reflective practice and peer feedback.
7. Identifies group learning needs when completed by teams either individually or collaboratively.

Once the clinician has identified areas for professional growth from the self-assessment tool, they can refer to the [Compendium of Educational Offerings Relevant to Interprofessional Comprehensive Geriatric Assessment](#) to access over 280 educational offerings to support their learning.

¹ Kay, K., Hawkins, S., Day, A., Briscoe, M., Daly, D., & Wong, K. (2017). A competency framework for inter professional comprehensive geriatric assessment. Cobourg, ON. Regional Geriatric Programs of Ontario. (<https://www.rgps.on.ca/wp-content/uploads/2017-CGA-Competencies-Framework-Report-FINAL.pdf>)

² Colthart, I., Bagnall, G., Evans, A., Allbutt, H., Haig, A., Illing, J., & McKinstry, B. (2008). The effectiveness of self-assessment on the identification of learner needs, learner activity and impact on clinical practice: BEME Guide no. 10. *Medical Teacher*, 30, 124-145.

Instructions

Self-Assessment Tool

For each practice area and behavioural statement, the self-assessment tool requires you to rate your knowledge, skills and abilities; to indicate if this is an area for your professional development, and to indicate when you would like to address this learning need. In order to determine what constitutes adequate knowledge and skill for each competency, you are encouraged to seek out feedback from mentors, colleagues and a review of the learning compendium.

1. Rate your knowledge, skills and ability using the following rating scale:

Knowledge, Skills and Ability Rating Scale					
N/A	0	1	2	3	4
Not applicable	I have no knowledge/skill in this competency.	I have limited knowledge/skills in this competency.	I have basic knowledge/skills in this competency.	I have moderate knowledge/skills in this competency.	I have in depth knowledge/skills in this competency.

2. Indicate if this is an area for professional development.

3. Indicate when this will be addressed.

Indicating a timeline for the areas of professional development helps prioritize and pace your learning needs. You can use general timelines such as 'Short', 'Medium', 'Long-term' to differentiate goals or you can add specific dates (i.e. December 2020 or 3 months).

4. Provide an example of how you demonstrate integration of these competencies in your practice.

Reflective practice facilitates professional growth by helping you understand what you have learned and how you have changed as a practitioner. It also supports your growth for critical analysis in understanding how you put into practice these behavioural statements.

Tailoring this self-assessment tool

This self-assessment tool should reflect your practice. Your program may add specific related content to tailor the tool to your clinical practice environment (i.e. administration/analysis of validated assessment tools unique to your practice).

The Summary Sheet

The summary sheet should be used by you to provide a summary of the area(s) where you will focus your current learning. List the specific knowledge and/or skill for each area. (i.e. ✓ Analysis and Interpretation: 3b. Analyze and interpret results against age-appropriate and patient-specific norms).

The Action Plan

The action plan template is useful to outline the details of HOW you will develop the identified skill and/or competency.

1. Core Geriatric Knowledge

Demonstrates fundamental understanding of physiological and biopsychosocial mechanisms of the aging processes, age-related changes to functioning, and the impact of frailty.

Core Geriatric Knowledge	Knowledge, Skills and Ability Rating Scale						Is this an area for professional development?		
	N/A	0	1	2	3	4	Yes	No	Timeline
1.a Applies knowledge relevant to geriatric clinical practice on:									
Normal aging									
Frailty									
Atypical presentations of medical conditions									
Management of the medically complex older adult									
Falls and mobility									
Immobility and its complications									
Cognitive function									
Mild cognitive impairment									
Dementias + associated symptoms									
Delirium									
Mood disorders and other psychiatric manifestations									
Pain management									
Nutrition/Malnutrition									
Bowel and bladder management									
Bone disorders									
Metabolic disorders									
Sleep									
Related clinical content:									

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Core Geriatric Knowledge	Knowledge, Skills and Ability Rating Scale						Is this an area for professional development?		
	N/A	0	1	2	3	4	Yes	No	Timeline
1.b Demonstrates skill in working with older adults with significant functional deficits and communication challenges (i.e. cognitive impairment, sensory impairments, behavioural problems or ethno-cultural pluralities).									
1.c Demonstrates knowledge of medication management.									
Completes a detailed Best Possible Medication History.									
Performs medication reconciliation.									
Promotes adherence to a drug regimen.									
Identifies potentially inappropriate medications for older adults.									
Recognizes polypharmacy.									
1.d Demonstrates knowledge of currently accepted recommendations for:									
Primary prevention of common geriatric syndromes ³ (list those that are pertinent to your role):									

³ Add program specific content if applicable (i.e. Falls; using Beers Criteria to assess appropriateness of medications increasing risk of falls)

Core Geriatric Knowledge	Knowledge, Skills and Ability Rating Scale						Is this an area for professional development?		
	N/A	0	1	2	3	4	Yes	No	Timeline
Secondary prevention of common geriatric syndromes ⁴ (list those that are pertinent to your role):									
1.e Demonstrates an awareness of the limitations of the scientific literature with regard to generalizability and applicability to a frail older population.									
Please provide an example of how you demonstrate these competencies in your practice:									

⁴ Add program specific content if applicable (i.e. Falls; recommending initiation of bisphosphonates to reduce fracture risk)

2. Screening, Assessment and Risk Identification

Gathers patient medical and social history and clinical data in sufficient depth to inform care planning and effective clinical decision making.

Screening, Assessment and Risk Identification	Knowledge, Skills and Ability Rating Scale						Is this an area for professional development?		
	N/A	0	1	2	3	4	Yes	No	Timeline
2.a Identifies and explores issues to be addressed in a patient encounter (context and preferences).									
2.b Conducts an assessment within identified domains of the CGA using clinical acumen with standardized, valid and reliable instruments as appropriate (list below):									
2.c Recognizes important clinical indicators to promote patient safety (e.g. signs and symptoms, laboratory tests, adverse effects).									
2.d Assesses an older person with multiple physical, medical, cognitive/psychiatric, functional, and/or social problems.									
2.e Identifies reliable sources of information to inform the patient history (e.g. Cumulative Patient Profile, involved family etc.).									
2.f Compiles a history, drawing from reliable sources, that is relevant, clear, concise and accurate to context and preferences for the purposes of prevention and health promotion, diagnosis, treatment and/or management.									
2.g Gathers information about a patient's beliefs, concerns, expectations and illness experience.									

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Screening, Assessment and Risk Identification	Knowledge, Skills and Ability Rating Scale						Is this an area for professional development?		
	N/A	0	1	2	3	4	Yes	No	Timeline
2.h Collects a collateral history; supporting details from a close source who knows the patient's daily routines and function accurately (e.g. family member or caregiver).									
2.i Recognizes the significance of behavioural observations in dementia care.									
2.j Assesses an older person for their capacity to consent to treatment and make personal decisions.									
2.k Recognizes and identifies risk factors for and assesses the presence of abuse/neglect (i.e. financial, physical, emotional, sexual).									
2.l Performs and/or interprets an environmental safety screen.									
2.m Identifies specific patient vulnerabilities across the social determinants of health (e.g. lack of family support, lack of primary care, and chronic mental health issues, financial challenges etc.) that increase the risk the patient's needs will not be met.									
2.n Identifies and assesses caregiver burden.									
Please provide an example of how you demonstrate these competencies in your practice:									

3. Analysis and Interpretation

Conducts accurate analysis of assessment findings and clinical information to develop a complete understanding of the patient's story. Integrates assessment findings within and across domains to formulate a cohesive clinical impression.

Analysis and Interpretation	Knowledge, Skills and Ability Rating Scale						Is this an area for professional development?		
	N/A	0	1	2	3	4	Yes	No	Timeline
3.a Synthesizes relevant information from multiple sources including perspectives of patients and families, colleagues, and other professionals.									
3.b Analyzes and interprets results against age-appropriate and patient-specific norms.									
3.c Analyzes and takes appropriate action related to important clinical indicators (e.g. signs and symptoms, laboratory tests, adverse effects) to promote patient safety.									
3.d Evaluates the reason for change from baseline pre-morbidity to current functional status.									
3.e Evaluates the restorative potential of the older patient.									
3.f Demonstrates the ability to deal effectively and efficiently with clinical complexity by prioritizing problems.									
Please provide an example of how you demonstrate these competencies in your practice:									

4. Care Planning and Intervention

Demonstrates expertise in treatment, education, goal setting, future and advance planning. With patients and their identified support network, formulates comprehensive, collaborative care plans focused on optimization of function and quality of life. Demonstrates knowledge of community resources and appropriate referral sources and mechanisms to access them. Conducts iterative and ongoing review and revision of the care plan and adjusts interventions and modifies goals as needed.

Care Planning and Intervention	Knowledge, Skills and Ability Rating Scale						Is this an area for professional development?		
	N/A	0	1	2	3	4	Yes	No	Timeline
4.a Engages patients, families, and relevant health professionals in shared decision-making to develop a plan of care.									
4.b Evaluates the level of engagement and capabilities of caregiver(s) to meet the needs of older patients.									
4.c Includes interventions to alleviate caregiver burden in the care plan.									
4.d Applies evidence-informed interventions appropriate to a geriatric population.									
4.e Uses information about behavioural observations to inform a patient centred goal-based care plan.									
4.f Develops care plans that include the use of preventive, adaptive and therapeutic interventions in collaboration with interprofessional team members.									
4.g Negotiates and constructs timely care plans reflecting a patient's goals, beliefs, concerns and expectations in the context of their health trajectory.									

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Care Planning and Intervention	Knowledge, Skills and Ability Rating Scale						Is this an area for professional development?		
	N/A	0	1	2	3	4	Yes	No	Timeline
4.h Clearly synthesizes the agreed interventions and responsibilities including follow-up actions.									
4.i Assures that individual responsibilities in a specific care plan are explicit and understood.									
4.j Checks for patient and family understanding, ability and willingness to follow through with recommended interventions within recommended time frames.									
4.k Encourages participation in health promotion and disease prevention activities.									
4.l Promotes safety while respecting patient autonomy in care planning decisions.									
4.m Proposes a safety plan in response to abuse, in conjunction with clinical team and others (e.g. police).									
4.n Mediates situations of conflict between older adults and their family members in relation to care planning.									
4.o Conducts follow-up consultation(s) to evaluate the therapeutic effectiveness of care plans.									
4.p Assesses acceptance, tolerance, safety, and adherence to the care plan.									
4.q Continues to refine interventions based on patient response and goal attainment.									
4.r Demonstrates the ability to promote integrated care of older patients, especially those with complex needs, and ease transitions across the variety of settings where they may receive services.									

Care Planning and Intervention	Knowledge, Skills and Ability Rating Scale						Is this an area for professional development?		
	N/A	0	1	2	3	4	Yes	No	Timeline
4.s Identifies the role of specialized geriatric services in providing case management for the frail senior.									
4.t Identifies and appropriately discharges patients whose specialized geriatric service goals have been met.									
4.u Reinforces the importance of advance care planning and discusses with patients and families the implications of their illness to allow patients and their families to prepare a robust advance care plan.									
4.v Supports patients and their families to access timely and appropriate end-of-life care consistent with their belief systems.									
Please provide an example of how you demonstrate these competencies in your practice:									

5. Interprofessional Practice

Demonstrates and supports interprofessional geriatric practice. Recognizes and engages in inter-organizational collaboration through understanding of the roles of internal and external team members, and demonstrates the ability to identify appropriate opportunities to refer to collaborating teams/individuals.

Interprofessional Practice	Knowledge, Skills and Ability Rating Scale						Is this an area for professional development?		
	N/A	0	1	2	3	4	Yes	No	Timeline
5.a Demonstrates both knowledge of critical concepts and the skills ⁶ needed for the effective functioning in multidisciplinary/interprofessional clinical teams.									
5.b Identifies and describes the role and expertise of members of the interprofessional team in the care of patients.									
5.c Demonstrates insight into limits of own expertise.									
5.d Demonstrates effective, appropriate, and timely consultation of another health professional as needed for optimal patient care.									
5.e Demonstrates the skills needed to address potential differences and misunderstandings between professionals.									
5.f Regularly reflects on dynamics and productivity of self and interprofessional team.									

⁶ Canadian Interprofessional Health Collaborative. (2010). A National Interprofessional Competency Framework; http://www.cihc.ca/files/CIHC_IPCompetencies_Feb1210.pdfNational Initiative for the Care of the Elderly, Core Interprofessional Competencies for Gerontology (http://www.nicenet.ca/files/NICE_Competencies.pdf)

Interprofessional Practice	Knowledge, Skills and Ability Rating Scale						Is this an area for professional development?		
	N/A	0	1	2	3	4	Yes	No	Timeline
<p>5.g Cooperates with and shows respect for all members of the interprofessional team by:</p> <ul style="list-style-type: none"> i) Making expertise available to others. ii) Sharing relevant information iii) Contributing to identification of shared areas of concern and strategies and priorities for patient care to address those concerns. 									
<p>5.h Participates in defining team goals and objectives.</p>									
<p>5.i Effectively collaborates with others, including primary health care providers and other partners:</p> <ul style="list-style-type: none"> i) To provide quality care. ii) In research, education, program review or administrative responsibilities. iii) To promote health and wellness in the community. 									
<p>Please provide an example of how you demonstrate these competencies in your practice:</p>									

6. Professional Practice

Demonstrates core values, behaviours and skills required to provide comprehensive, team based geriatric care. Demonstrates confidence in evaluating and maximizing own professional scope to optimize geriatric practice.

Professional Practice	Knowledge, Skills and Ability Rating Scale						Is this an area for professional development?		
	N/A	0	1	2	3	4	Yes	No	Timeline
6.a Demonstrates compassionate and patient-centered care.									
6.b Facilitates older adults' active participation in all aspects of their own health care (e.g. access to information, right to self-determination, right to live at risk, access to information and privacy).									
6.c Respects and promotes older adults' rights to dignity and self-determination.									
6.d Demonstrates leadership and accountability for providing follow-up on identified patient needs or directing follow-up as appropriate.									
6.e Discusses with the patient the ongoing responsibilities of the geriatric assessor, patient and other health care professionals.									
6.f Understands and applies the principles of capacity for decision making and informed consent.									
6.g Follows procedures for voluntary consent or proxy decision making (e.g. Substitute Decision Maker, Public Guardian and Trustee etc.) that arise from aging issues.									
6.h Obtains informed consent throughout assessment, care planning and interventions.									
6.i Evaluates the impact of family dynamics on patient's health, safety, and therapeutic goals.									

Professional Practice	Knowledge, Skills and Ability Rating Scale						Is this an area for professional development?		
	N/A	0	1	2	3	4	Yes	No	Timeline
6.j Respects diversity and difference, including but not limited to the impact of gender, sexual identity, family dynamics, religion and cultural beliefs on decision-making.									
6.k Addresses challenging issues effectively, such as obtaining informed consent, sensitively discussing a diagnosis/prognosis, addressing emotional responses, confusion or misunderstanding.									
6.l Identifies and appropriately responds to relevant ethical issues arising in the care of older adults.									
6.m Maintains the patient's health record as per organizational policy and legislated requirements.									
6.n Documents and shares within the circle of care, the patient goals, appropriate findings of patient assessment, recommendations made, responsibilities of involved parties and actions taken.									
6.o Documents communication with patient and health care professionals across the broad care team in the appropriate locations (e.g. patient record and/or care plan) including connections with inter and extra agency team members, telephone calls of a clinical nature etc.									
6.p Evaluates self and demonstrates an understanding of the importance of and the process of continuing professional development. <ul style="list-style-type: none"> i) Critically reflects on own practice. ii) Assesses own learning needs. iii) Develops a plan to meet learning needs. iv) Seeks and evaluates learning opportunities to enhance practice. v) Incorporates learning into practice. vi) Acts as a preceptor/mentor for interprofessional team and students. 									
Please provide an example of how you demonstrate these competencies in your practice:									

Date completed:

Summary Sheet

In which competencies have you indicated as areas for improvement?

- Core Geriatric Knowledge:**
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- Screening, assessment and risk identification:**
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- Analysis and interpretation:**
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- Care Planning and Intervention:**
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- Interprofessional Practice:**
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- Professional Practice:**
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Action Plan

 Use for each skill and competency you wish to develop at this time.

Select skills and/or competencies to develop with input from a mentor and/or supervisor.

Skill / Competency to Develop:

Goal should be written using the S.M.A.R.T. criteria:

S - Specific, **M** - Measurable, **A** - Action Oriented, **R** - Realistic; within your control and **T** - Time constrained

Goal:
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Action steps to achieve your goal (elicit feedback from mentor, supervisor and/or peers):

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Action Plan

What obstacles do you anticipate facing and how will you overcome them?

Obstacles:

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-

How will you overcome it?

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-
-

What resources will you need to achieve your goal? (People, Information, Training, etc.)

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How will you track your progress?

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Date goal completed: