



# Pillar 1

**Establish a Foundation**



# Pillar 1: Establish a Foundation

The first pillar of this guide focuses on the critical process of engaging local champions and decision makers to demonstrate the value and relevance of integrating cognitive screening for dementia into practice. This section includes tips on how to engage stakeholders, identify areas of need, establish initial metrics and goals, and organize next steps into an action plan to align a proposal with organizational priorities (i.e., mission, vision, strategic goals).

## Action Steps

- 1 Understand your Purpose, Priorities, and Environment
- 2 Identify and Engage Decision Makers and Champions
- 3 Scope an Initial Proposal
- 4 Determine Next Steps

| Documents you'll need to complete pillar 1   | Supplementary resources   |
|--|---|
| <ul style="list-style-type: none"> <li>• <a href="#"><u>The Importance of Cognitive Screening and Early Dementia Detection</u></a></li> <li>• <a href="#"><u>Project Plan Template for Cognitive Health Screening</u></a></li> <li>• <a href="#"><u>Making a Case for Cognitive Screening SBAR Template</u></a></li> </ul> | <ul style="list-style-type: none"> <li>• <a href="#"><u>Identifying Champions</u></a></li> <li>• <a href="#"><u>Suggested Cognitive Screening Metrics and Measures</u></a></li> <li>• <a href="#"><u>Dementia Care Aware Program Offerings</u></a></li> </ul> |

Below you will find four action steps to guide you in securing organizational support for implementing cognitive screening in your primary care practice. A to-do list is provided to help you complete each step.

## ACTION STEP 1:

### Understand your Purpose, Priorities, and Environment

#### To-do List:

- Learn about the purpose and benefits of early detection
- Discuss organization priorities with leadership
- Discuss the current state of processes and protocols with frontline staff

To ensure the success of any change, it is important that the proposed change meets a need, fulfils a requirement, demonstrates an added benefit for the organization, or ideally all three!



#### Learn about the purpose and benefits of early detection.

Visit the [Dementia Care Aware website](#) to learn about the importance of detecting dementia early, the benefits of cognitive screening and brain health planning, and what is required to provide this service for patients experiencing cognitive impairment.



#### Discuss organization priorities with leadership.

Engage your leadership to gain insights into the organization's priorities and needs. Discuss their perceptions of needs and the policies guiding decision-making. Conversations may revolve around (1) how implementing dementia screening aligns with the needs of the patients that the organization serves (e.g. How many are older adults?), (2) initiatives the clinic or health system is currently pursuing, and (3) the mission, vision, and goals of the organization. Think about if and how your organization is currently meeting the needs of your patients, and challenge what you think you know about the current state of dementia care in your organization to avoid making assumptions about whether your patients' needs are currently being met or not.

**Some questions to ask leadership:**

- 1 What are the top three priorities right now for this organization, and how do you see them evolving in the coming year?
- 2 What are the biggest influences that shape how the organization sets priorities or goals?
- 3 What are some key metrics that the organization is monitoring?
- 4 In your view, how could a new program for screening older patients for dementia fit into our organizations current priorities?



**Learn from frontline staff**

Another next step, or to pursue at the same time, is to engage frontline staff in understanding their perspective on including a new screenings process for dementia into clinical care.

**Some questions to ask frontline staff:**

- 1 What dementia care needs have you noticed for patients and their care partners?
- 2 How equipped do you feel to provide screening and care planning for patients?
- 3 What are the barriers to screening for dementia?

## ACTION STEP 2:

### Identify and Engage Decision Makers and Champions

#### To-do List:

- Identify decision makers and dementia care champions
- Establish a workgroup of all relevant project participants and stakeholders

Use what you learned from Action Step 1 to identify your organizations decision makers and dementia care champions. Conversations with your organization's leadership will help you identify the people who have decision making power and influence over access to resources and can help get things done.

Develop a plan to sustain engagement with those individuals. In an environment with constantly changing priorities, you will need to insure dementia care stays on the organization's priority list.



#### How to Spot a Champion

There are many ways to define a champion, but simply put, a champion is an advocate of a program or a cause who provides momentum and connections to ensure success. They are vital for ensuring practice change. Champions are generally passionate, motivated, positive thinkers, problem solvers, well connected, and action oriented. Particularly around the change management issue that you are trying to address. Clinician engagement in the change process has been identified as a critical factor for establishing and sustaining change.<sup>10</sup>

Learn more about the [different types of champions here.](#)

**Some questions to ask yourself and others in this process:**

- 1 Who is dependent on whom and for what resources?
- 2 What layers of approval or dependencies exist?
- 3 How do frontline and leadership interact and influence one another?
- 4 Who makes financial decisions?
- 5 Who are the key people to influence? What different approaches are needed for these audiences?
- 6 What time and resources are available?
- 7 Who in the organization will be most affected by this initiative?

## ACTION STEP 3:

### Scope an Initial Proposal

#### To-do List:

- Match your needs with Dementia Care Aware program offerings
- Draft a high-level proposal to leadership
- Draft communications (SBAR, Memo, Emails, Flyers) to disseminate information to staff on the project's overall intent and goals.

Now that you understand your organizational priorities and who you need to engage, you're ready to match those needs with Dementia Care Aware program offerings and draft a high-level proposal to leadership. Be mindful of the scope and propose by starting small using a pilot approach.

**[You can find a document outlining the benefits of and incentives for annual screenings and early detection here.](#)**

Studies show that "those directly and indirectly affected by change are more likely to commit to and embrace change when they contribute to the decision-making about the change and understand why and how the change is going to improve patient and/or staff experiences or the healthcare environment (Harrison et al., 2021). Keep this in mind when developing your plan so you have a higher change of success.

When drafting your proposal, provide data and clear connection to strategies, whenever possible. Understand that decision-makers who control vital resources are constantly approached by others to support projects, and address issues throughout the organization so it may take time and multiple conversations to arrive at an agreed upon solution.

Your organization might have a template or protocol for such proposals, but utilizing a Situation, Background, Assessment and Recommendation or Request (SBAR) format is something to consider. Reference our **[Making a Case to Leadership SBAR here.](#)**

## ACTION STEP4:

### Determine Next Steps

#### To-do List:

- Craft a more detailed plan
- Figure out concrete next steps and how to monitor progress
- Set up a communication plan to keep stakeholders and leadership in the loop on implementation progress.

You may be given a greenlight to move forward after engaging with leadership, however discussions may bring concerns, hesitations, and barriers to the surface. If your initial proposal was not approved as is, take a step back and address any questions or concerns from leadership and work together with champions to come up with creative solutions. It could be that the pilot might need to wait until there is capacity in the organization, or that the proposal needs to be scaled down to a simpler approach to determine feasibility.

If you do have the go-ahead, it may be worth crafting a more detailed plan to think through how to approach implementing the CHA practically. Work with a few champions to figure out some concrete next steps and how you will monitor the work over time. Your organization might have a template or protocol for such project plans, but we have drafted an example project plan template and workbook for reference.

[Access the Project Planning document here.](#)

#### Here are some questions you might want to ask:

- 1 What is the timeline for this pilot? At what points will you check in on the process?
- 2 Who needs to be involved?
- 3 In what forums will people discuss the work?
- 4 How do you determine the impact and/or success of the pilot?
- 5 What ways are you going to engage the members of the clinic in the process?