ShareVision

Customer Story: Chilliwack Society for Community Living

A conversation with Jeff Gilbank, Quality Assurance Director

Customer snapshot		
Jeff talks about what makes a great ShareVision Administrator, fostering trust and transparency with CLBC and how CSCL secured a CARF Accreditation Commendation with only 2 months of preparation	**Organization:** Chilliwack Society for Community Living	**Head office:** Chilliwack, BC
	Number of staff: ~300	**Customer website:** http://cscl.org
	Focus of organization: Supporting people with intellectual disabilities	**Accreditation:** CARF Canada
	Customer since: 2006	**Solution:** ShareVision Custom

Conversation with Jeff Gilbank

Please tell me more about the Chilliwack Society and your role in the organization.

The Chilliwack Society for Community Living is a non-profit organization. We are based in Chilliwack, BC but our catchment area goes all the way up to Boston Bar.

We have pretty much the gamut of services when it comes to community living organizations, so you've got full-time 24/7 residential homes for people right up to employment options, respite options, etc. We are approaching 500 individuals who receive different types of support.

We do children and youth services as well. We have summer programs for kids, respite options for families with kids, after-school programs, etc. It's pretty much birth to death, which is a terrible expression but that's pretty much what we offer as far as services.

I was a Service Director pretty much since I got here - this is my 10th year now - but in February 2017 my role changed to a Quality Assurance Director. So now I look at more centralized measurements, outcomes, etc.

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What is your favorite aspect of the new role?

It's given me the opportunity to pretty much devote time and energy towards project work for the benefit of the organization. As a Service Director previously, I loved being directly involved in our services with direct impact for families and individuals. I had to give that up but I recognized that it's needed when you look at the growth of the organization. It's pretty typical when you compare other organizations to where we are at right now, in that kind of growing phase, that you start to centralize a lot of systems and Quality Assurance is one of them.

What are the biggest challenges facing you at this stage?

Well, the biggest challenge right now is (because we) recently upgraded from our old version to the new version. I promised everybody here that we are no longer going to use the old system and we are only going to use the new system. Right now, we are kinda doing a hybrid. People are okay with that because they understand it's a transition but they prefer just working in one database.

Now that you are starting with a blank slate, what are some of the things you are excited about and what are some of the things you would do differently from the last go-around?

This time around we have a ShareVision working group and there's, let me see, probably 8 people involved in that. They are employees. They have a bit of tech basics as far as they know how to get around on the internet, they certainly know how to use ShareVision.

And so, what we didn't do back when we first introduced it 10 years ago ... I did most of it myself. This time I have a working group that does a lot of the tasks like data transfers, list building .. - things that you can teach and they are off and running with it.

Last time there was really no expectation and we just built .. so you know, we'd take a paper form and eventually make into an electronic ShareVision list (form) but because all those things are already in the existing system now, people expect to see them in the new system but that took us 10 years to build - because I always say we are always building ShareVision, it's never complete.

This time we literally had to have all those things from the old version already built in the new system prior to our first release date last year so we are doing things a lot differently just because of the volume of work. I needed people to help out. That's probably the biggest difference.

Data System Search & Implementation

And were you the original administrator when the agency started looking for a system way back in the day?

Yes, yes, I came over from another organization. My wife and I wanted to start a family, so we moved in the Valley because we couldn't afford to live in Vancouver <laughter> and we really didn't want to raise kids in Vancouver, but that's a side story. So, we came out in the Valley and I'd been working with another community living organization when I was living in Vancouver and I introduced ShareVision to them with the help of a ShareVision Product Expert. It was really successful there and when I got out here I said "You guys should be looking at a database!".

They were actually discovering that themselves that they needed something. They were locked into Excel spreadsheets and pretty much using the Microsoft Office suite but, you know, not in ways that would connect and give you the same kind of benefits that a database would.

So, I gave Chilliwack the option of ShareVision. It was pretty obvious that people liked it right away - and I had the benefit of the other organization's experience as far as growing things there and getting the database up - so it was a no-brainer, pretty much.

Yeah, it sounds like it. And back then, I would imagine that you were a pioneer because even today when we speak to various agencies they are still on paper.

Yeah, I don't know how they do it, honestly. I think since they are still on it, paper is meeting their needs but what is the power of having a database is that it gives you things that you would have not even considered in a paper system.

An electronic system gives you data, it gives you options that not only you wouldn't consider if you didn't have a system but you just wouldn't even think of because the option isn't even there in the first place.

*So, I don't know how people do it now with the demands of accreditation, the demands of reporting, etc. It's an expectation, I think, in the field now that we have some sophistication as far as reporting and our organizational structures. And to not have a technology have a role in that just seems really, I don't know, I don't want to put a judgment on it but I can say that for me, for us, it's a **needed** tool. We **need** ShareVision, we **need** to have a database.*

ShareVision Use & Benefits

Speaking of having a database, tell me more about how you use ShareVision.

We use it pretty much for everything. There's not a day that goes by that, if you are working at the Society, you're not logging into ShareVision at some point.

So, whether you are a worker at a group home, or you are someone supporting someone with employment, all staff really, you are 100% logging in because that's the expectation that we want people to share what they've done.

*We premise it pretty much on a simple question... You know the reporting can get complex and it gets detailed after a while but the question of the day for someone if you are supporting someone in the community is **"What did you do today?"**, that's it! "What did you do today?" And then we format our reporting to basically steer back to that question "What did you do today?", "What did you do today?". And you know, it's a little more complex than that but the question pretty much condenses down to that.*

And then, for our administration, we use it for our HR, our financial teams, our maintenance teams. We even use it for our vehicle maintenance, which is an external mechanic shop here, so they're not employees, but they use the database because we connected them into it and then any time we do a Repair a Vehicle Request, they get emailed as soon as the person submits the request.

So, we introduced ways where we are sharing ShareVision access with our external stakeholders, or people that help us. Honestly, we use it for everything and where we are not using it, we are planning on using it.

It is very interesting listening to you even what you just shared that you always come back to the question "What did you do today?", just even that little tidbit tells me that you think about it in a very innovative way. It's not just a tool, it's not just about making documents electronic and getting off of paper, it's much more than that. It's really refreshing to hear, so I skipped over the question because in some ways you answered it but I want to go back to it and ask you, what inspires you, on a personal level even, if you will, to think that way and to push the envelope?

Well, for sure, it's the impact on the people we support. We are confident .. I can 100% say with assurance that having this database helps the people we support. It's not direct impact but it does make a positive difference. That for sure inspires us.

Another inspiration is that this is my 25th year in community living so prior to this we were doing a paper system and I remember working offline and having to write log after log about people. At some point I knew that no one is reading this thing, no one is using this information for anything else. They thought it was a good idea to log what you did today, which is great - we should that - but it was never used!

So, it was like, well what are we spending all this time for? We are spending a lot of time, we are spending a lot of effort on recording things but we are not using the information for anything. That's not so much an inspiration, but it just irked me.

So, our promise here, is if we are asking a question, or we are asking for data, it's because we intend to use it for something else, or we are already using it for something else and that something else is to further the organization's mandate or mission, or it's to meet a certain standard, or the accreditation standard. You know, it's a means to an end.

Reporting, Analytics & CLBC Collaboration

Speaking of data, have you thought of specific ways to quantify what the system does for you, maybe saved time for the employees, or some sort of impact that you see in numbers?

For us, it's not about time saving though that's not to say it doesn't save time. It's almost like a pyramid: if you look at the top half of the pyramid you are using data to build out outcomes management reports, or performance management reports. That's where it really saves time.

The people who used to do reports in the paper system.. the database saves them time. I know my former supervisor said it would take her weeks and months to put together an outcomes measurement report. And, once we introduced ShareVision, it literally whittled it out to days.

So, for her, it was enormous savings but that's one person out of 300 people working here, the majority of them online. They won't see the time savings, but what we have been consistent about - because they still have to report, whether you are reporting on a piece of paper or whether you are reporting electronically, it still takes time to do that - so we invented what we call the 5% rule.

The 5% rule basically meant we got an agreement from everybody, online that said "What's the percentage of time you would agree to dedicate to documentation?" and everyone agreed that 5% was fair. Some said 10%, some didn't want to document at all. Well, that's unfortunately not a reality but we agreed on 5%.

We basically say ok 5% of your time is, you agree, for documentation. In an 8-hour shift that's about 20 minutes and when we design our questions for people to answer every day - and again it all comes back to "What did you do today?" - we don't go beyond 20 minutes.

And, we actually test this: we sit people down, slowly roll something out and say, "Ok, this happened, this happened, this happened, this happened. Here is what you got to do to report on it." Sometimes you may have a Critical Incident Report, sometimes you may have an injury report. And then you combine that with the daily log requirements and we've been pretty good.. we've been kind of on 20 minutes. It doesn't save them time but what we've told staff that everything they are reporting will be used for something else. Whether it's for an injury report we're going to be sharing that with WorkSafe, or our OH&S (Occupational Health & Safety) committee - we have another health and safety committee that looks at the broader, more global impact. But it all comes from that first report the staff does.

*The same thing with Critical Incidents. We've got an alert system in ShareVision that sends an email to the Manager as soon as people fill out a Critical Incident form. Managers get that in real time because we've set the system up and equipped them with devices like smart phones, so they can see it wherever they are. And once they vet it, or approve the version of the critical incident, that gets sent to **CLBC (Community Living British Columbia)**.*

***CLBC** is another stakeholder with us. They also have accounts within our ShareVision system and they get the email alert as well. Something can happen right now in a group home and people that need to know will get alerted instantly and will have all information within 5 minutes. Decision makers are able to make better decisions because the reporting, the documentation is coming to them sooner.*

ShareVision

It's very efficient and impressive that CLBC has agreed to receive alerts directly from ShareVision for your reports!

They have, yeah and kudos to them but I think they bought into it because we've created this culture of transparency. We give them access, they can see anything they want to see. The log note or a file note from something that happened yesterday with whomever, they can see it. We don't lock things down. They have the right, they have contractual right to have access to that information, so we have just given them access to it. And because we have created that trust and that culture of transparency, they are more willing now to work with us as far as innovative ways for sharing information.

Brilliant! And I am sure especially the management and executive staff really appreciates it but then the 5% rule, which you mentioned earlier .. if I am a busy front-line worker and know that you know how limited my time is and value that in the way you design processes, I mean, I will be very happy as well.

Yeah, I think if people understand that it is a means to an end - again, we are not asking for things we are not going to use in some other way - they really understand that and when they think that we've also taken the time to be considerate of their time and what their tasks are during the day, because documentation is not the primary task for their day .. If they feel that there has been a thoughtful process, there's been a lot of conversation around it, then I think they are more attuned to buy into it all, so it's helpful.

Using ShareVision for Accreditation, incl. CARF, Focus, etc.

Switching gears a little bit, what have you heard them speak about when it comes to ShareVision? Perhaps let's start with what are some of their favorite things and then maybe your favorite things about the site?

*It's changed over time but now for sure the way we've used it with our **CARF (Commission on Accreditation of Rehabilitation Facilities) accreditation**. It just seems that every time we get a survey now from CARF they are ecstatic with what they see. ShareVision always makes the report as far as strengths, and in more ways than just one.*

All info is in one place – saves time. Client information is very accessible. In our last report, the accreditor basically said "Can I hire you guys to come down?".. <laughter> you know, he honestly said that. "I am so impressed with the way you use this."

And the lead surveyor said "You are using ShareVision in ways that other organizations aren't". She had a first-hand experience and was impressed. That's my favorite thing, just to be confident that what we are doing is working. Because we work our way and we think we are doing ok but when we hear that external recognition, it solidifies a lot of the work and effort that we do through the years.

*CARF has this "grand prize" so to speak called **"Commendation"** and they don't give these out very often. We've only received one in five surveys over the span of 15 years and it was because of ShareVision, because of how we do our data management. We just got accredited a few months ago and again the results came back bringing endorsements to ShareVision.*

That's great to hear and it's definitely ShareVision but it's also your hard work, so congratulations for that!

Yes, we are pretty proud of it.

Amazing! Now let's look at how exactly you use the platform during the accreditation process or for the purposes of accreditation.

It's an embedded process. We are constantly updating our evidence, every day. Prior to ShareVision it would have been 6 months to a year of work to prepare for accreditation. Now it's probably down to 4 weeks. We don't spend a lot of time preparing for CARF anymore because we have embedded our evidence into our daily reporting and it just gets updated every day. So, it's always good to go.

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We have a list called CARF Standards. We basically just copy, paste and download the CARF standards. We have their Indicator Standard, we've got a field or a column called Section, one called Criterion, exactly the way they have it in their manual. We put the description of the Criterion in, the Intent Statements and any examples they might need. That's called CARF Information Section and that's pretty much the information that's based on their CARF manual. And then in the Committee Section we have a few columns but the biggest one is Evidence of Compliance which is the narrative, i.e. a written narrative as far as how we meet the standards. Then, what we have in the next column called Relevant Documentation or Hyperlinks where we've actually hyperlinked the evidence from lists in ShareVision, if that makes sense. It's easier to see if you can see it.

And, because we have another kind of organizational infrastructure piece called Quality Assurance by Committee where every standard is assigned to a committee and the committees meet frequently throughout the year, the work is being done as we speak. Right now there can be a committee meeting where they are updating whatever they are responsible for. So, for medication committee, they'll be updating any lists that are connected to medication including medication error reports. We link that medication error report as a hyperlink for Relevant Documentation to the standard and it just gets updated. So basically, the surveyor can come in at any time and see that the evidence as it is today. So yeah, it's pretty cool.

I know from their experience, the CARF surveyor experience, they're just blown away by this! They just can't believe that this work can be done but for us, once it's set up and embedded into our process this year, it just takes care of itself. It's automated, no one has to worry about it. We don't have a CARF Accreditation person that has to assemble stuff. We don't have CARF Accreditation working groups that have to get together for the purpose of CARF accreditation. We've embedded it into our practice, our committee infrastructure, but also the way we use ShareVision and it's constantly being updated.

ShareVision

> What are some words of advice you have for an agency looking to get accredited with CARF or another accreditation body?

You have an amazing product, you do! What I tell people is you have to have the infrastructure to support that amazing product, so that means obviously technically you need to have people online, so that means you have to have computers available. You have to have laptops available. You have to have devices available that they can use and then they have to be familiar with those devices. So, you have to have a technology infrastructure before you can do these things.

And then, the other part of the infrastructure you need is you're gonna need someone to champion it. You're going to need that person or a couple of people to take this on. So, you will have to dedicate time for that. You can't just have this as a side on your desk, especially during implementation. A lot of this, as you know, is front-loaded so you have to spend some time upfront to get it underway but once it gets underway and people start using it, given that you have that infrastructure where people can use it, they are off and running. That's where we are.

We've been off and running for a long time and because of that, then it really helps you with the CARF (accreditation). It's the pyramid, right? The people on the top of the pyramid - that's terrible, I don't mean that by hierarchy at all - the people assigned to those events - accreditation is an event, it happens every three years, so it's not due today - but man, the time-savings if you have a database will save those people months of work! We are not just talking days, we're talking months of work. It only affects so many people, however, the impact on the organization is huge.

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We are a pretty good testimonial to that. We get pretty good accolades. Because we have embedded it into our practice, as far as reporting takes care of itself. And honestly this year we got accredited in April and we didn't even have our first ShareVision meeting till February. We talked about it in January, we got serious about it in February, we really started working and getting things done in March and by the time we came in in April, it was all done. It doesn't take long once you get these things embedded but again, if you are talking to someone new, those are years away. We've been doing this for 10 years and it's taken us a year and a bit now just to start fully using the new version. We are still not done, we still have 6 more months of work here. It's a big project.

The Makings of a Great ShareVision Administrator

Yes, it is a big project and it requires a strong leader, which brings me to my next question. What makes a good ShareVision administrator?

Well definitely you need a technical zeal. You don't need to have a degree in Information Management or Information Technology, but you definitely need to have a curiosity. You guys have a lot of wizards and a lot of tool sets now that are very helpful and so as long as people have a linear .. okay I click here to get this, I click here to get that .. as long as they have that understanding, then that's good.

*But, for me, you have to **know your organization and the needs of the organization** because, like I said, we've been trying to centralize things in this field for decades. We all claim to do the same work but things look different from organization to organization. These are my friends, these are colleagues that I've known for years and (we chat) "Oh you do it this way? Oh well, we do it this way. And yeah oh that works for you.." and there is quite a difference sometimes.*

*So, you are just going to need that **person that understands community living and understands the mission of the organization**. Although we claim to do the same thing from organization to organization, it does **look** different.*

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I have one last question for you. What does your favorite day at work look like?

My favorite day at work - I love this question. It's the impacts we have on people! For me, it's project work. My favorite thing right now is - I am a big hockey fan - and we just hooked in the Montreal Canadians alumnae to play us. They're going to play a game here!

Wow, awesome!

I know, right!? And that's a project and I am part of the organizing committee. So, if you are in Chilliwack, February 15, Thursday night, that's going to happen. We've got to put together a hockey team. We are partnering with Prospera Place, the local hockey rink and the junior team, the Chilliwack Chiefs. We are partnering with the Chamber of Commerce, we are partnering with Rotary [The Rotary Club of Chilliwack] because everybody wants in on this.

So, it's a really good community project and that's what we are always trying to do. Of course, we support people with developmental disabilities but we recognize that the more we are connected to the community, the more we are able to build people's social capital as far as their contribution, presence, and participation in the community. So, we are always looking for community projects to get hooked into, so we can promote community. We believe in a community that welcomes and includes everyone. So that's my favorite day at work!

It's kind of like ShareVision - it's indirectly supporting people with developmental disabilities. Our field is still about one-to-one relationship building with people but it's these exterior, anterior kind of supports, so ShareVision is one of them, the Montreal Canadians is another one of them <chuckle> and it all indirectly supports the whole mission. I loved this question!

I love it too and I feel your spirit really comes through in this question.

Oh yeah, community living is unbelievable. I still can't believe I get paid some days. I'm going to get paid to play a hockey game with the Montreal Canadians!?" Maybe not that day but the organizing, wow I am getting paid for this ... I can do this for free.

Want a private demo?

Contact us to set up a private demo and to explore if ShareVision would work for your organization.

Natalia Stefanova
ShareVision | Social Services Software *Re-imagined*
1.866.971.4325 ext. 4329
natalia@sharevision.ca **|** www.sharevision.ca