

## Safe Patient Handling and Mobility Toolkit – Tool 4g

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To learn more about choosing SPHM program components refer to the Sections 3 & 4 in the **Safe Patient Handling and Mobility: A Toolkit for Program Development 2025** at:

<https://www.nvha.net/safe-patient-handling-and-mobility-toolkit/>

### Unit-Based Safe Patient Handling & Mobility (SPHM) Champions

Several studies of safe patient handling and mobility (SPHM) programs have found that the “peer leaders” or unit-based champions/coaches play an important role in ensuring program success when they are integrated within a multifaceted SPHM program. They help to foster knowledge transfer and forge a connection between staff and program goals which facilitate culture change (Alamgir et al., 2011; Elnitsky et al., 2015; Hurtado et al., 2018; Knibbe et al., 2012; Olinski & Norton, 2017; Stevens et al., 2013; Powell-Cope et al., 2014; Ziam, et al., 2020).

Ziam, et al., found that the support of a resource person to facilitate SPHM practices is important in prevention of patient-handling related injuries and that nursing staff preferred that person to be a colleague, who would be able to better understand the difficulties they face (Ziam, et al., 2020).

**The following considerations for establishing a unit-based SPHM champion program are drawn from professional publications and the authors' experience in managing SPHM champion initiatives.**

**More information about champion programs can be found in the references and resources provided with this tool.**

### Description

A unit base champion is a staff person that has received additional SPHM training and gained practical expertise in the use of equipment and best work practices.

Champions help their unit/dept. and the organization meet SPHM program goals by:

- Assisting integration of evidence-based practice that achieves effective and safe care and thereby facilitating culture change on a unit/department.
- Acting as a leader, mentor, advocate to promote and raise the collective awareness of a program e.g., SPHM to peers and other staff.
- Performing as a coach that will demonstrate and assist coworkers in using SPHM equipment and troubleshoot issues.
- Advocating new ideas or initiatives and working diligently to promote them.

### Specific Roles/Functions - Example

- Review safe and appropriate use of SPHM equipment and processes with new and existing unit staff
- Coach staff and ensure compliance with use of SPHM processes e.g.,
  - SPHM patient mobility assessment tools
  - Documentation and communications
- Troubleshoot SPHM equipment & supply issues

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- Conducts staff in-services/training on SPHM issues, equipment, etc.
- Conduct periodic 'real time' competency-based audits of SPHM equipment use processes and patient experience
- Identify barriers to SPHM equipment use and collaborate with staff and the SPHM program coordinator to address them
- Actively participate in Daily Safety Huddles
- May be involved in after Action Review of patient handling related injuries on the unit
- Assist staff and unit leaders to address specific SPHM related issues e.g., safe care of a dependent patient of size, patient refusal to use SPHM equipment, etc.
- Assist in educating patients, families and other non-unit staff about the SPHM program and use of equipment
- Assist to design SPHM marketing initiatives on a unit that facilitates staff engagement in the program
- Help assess unit/dept. SPHM equipment needs and selecting through trials/equipment fairs
- Assist with development of content for caregiver SPHM training
- Communicate ideas/program feedback to unit/dept. manager, SPHM program coordinator and committee
- Assist in program monitoring and evaluation in collaboration with SPHM Team
- Actively participate in SPHM champion training and support activities to gain further knowledge and expertise.

### Characteristics of Effective Champions

- Creative, energetic, and enthusiastic about champion role. (Motivation may be due to a previous work-related patient handling related injury and thus a desire to help keep coworkers safe)
- Effective communication and interpersonal skills
- Ability to influence others to practice evidence-based care/serves as a role model (is respected by peers on unit) Is willing to take the time to educate, elicit feedback from, and provide regular updates to unit staff members about the SPHM program and progress on the unit
- Recognized as credible by those with whom they work and senior management

Champions could be RNs, LPNs and CNAs on patient care units, therapists or therapy aides in rehabilitation departments, technicians e.g., for Imaging depts., and medical assistants in outpatient clinics.

### Recruiting Champions

- Hand-picked by SPHM program coordinator and/or unit managers or volunteers (preferred)
- Recruit at SPHM staff training and/or unit staff meetings

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- Caution if choosing staff who are already volunteering for many committees and/or other patient care-related champion programs. Review if they have the time commitment to support the SPHM program.
- Define the role and the benefits to them.

**Training Requirements** - Refer to Section 6, Tools 6a and c and the resources provided in this tool.

SPHM program coordinators, instructors, peer leaders, champions, and clinical experts require not only basic and advanced SPHM training, but additional instruction in effective adult teaching methods, change management strategies, and regular refresher training to effectively guide caregivers.

### Program Management Considerations

- Is there a clearly defined champion program plan?
- How will the program be managed? Effective management of the program is essential for success. The SPHM program coordinator is the preferred manager of the program
- Are champion roles and responsibilities clearly defined and communicated?
- Will the unit-based champion role be paid or voluntary?
- What is the cost of the program - initial and ongoing budget and resource requirements?
- What are the initial and ongoing training costs – time and trainer needs?
- How will champions be recruited?
- Will there be at least 1 SPHM champion per shift on each unit where the SPHM program is implemented?
- Will volunteer champions be given the time to perform their job duties i.e., is there sufficient staffing to coverage their time away from direct patient care?
- How will champions be supported and recognized ?
- How will the champion program be evaluated for effectiveness and modified as needed i.e., with input from management, employees, champions and SPHM program management?

**Refer to Section 9** for more information about SPHM program sustainability and expanding the unit-champion role to incorporate other patient and staff related safety needs such as early safe mobility, patient fall and violence prevention.

### Supporting and Retaining Champions

- Give the safety champion the power to come up with quick solutions to certain problems, such as getting equipment fixed or replaced
- Champion group meetings/point-of care-support and SPHM problem solving activities with the SPHM program coordinator
- Linkage to other champion groups in a facility to promote mutual support and learning

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- Periodic refresher training and other educational opportunities e.g., participation in SPHM webinars and conferences
- Performance review and support to improve any gaps in knowledge/practice etc.
- Regular communications such as via an email group and newsletters
- Recognition & celebration of successes unit/facility wide

### Example of Time Required for Champion Duties (Voluntary Role)

Hours per week: Estimate 4-6 hours/week but flexible depending on regular workload

Expected to:

- Attend 8-hour champion training in addition to core SPHM training for caregivers. Complete competency-based training by teaching a caregiver SPHM class with oversight by the champion program trainer.
- Attend 4- hour champion refresher training annually
- Attend monthly SPHM committee meeting periodically as feasible
- Attend quarterly champion meetings

### References & Resources

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