The optimal time for patient transfer of care (discharge) from hospital is when a patient is medically stable to leave the hospital and any social and functional issues have been addressed. This is usually when both:
1. the ongoing medical care needs can be provided at home, and
2. when the patient or their carer is confident in their abilities to provide this care.

Under Criteria Led Discharge (CLD) the decisions for discharge are made and documented by the senior medical clinician (e.g. Senior Consultant, Medical Fellow, Visiting Medical Officer). PART A and B on the CLD form.

For appropriate patients CLD competent staff (e.g. nursing, allied health, junior medical officer) can then facilitate the discharge of a patient according to the documented criteria. The CLD competent staff member is responsible for monitoring that the CLD criteria have been met on PART C of the CLD form.

This survey is a tool to recognise and understand key barriers to implementing criteria led discharge (CLD) and also to identify strengths in sustaining improvement around CLD. It asks questions across three domains:

1. Process
2. Staff
3. Organisation
Your Processes

1. Benefits beyond helping patients
   • In addition to helping patients, are there other benefits?
   • For example, does the change reduce waste or avoid duplication?
   • Will it make things run more smoothly?
   • Will staff notice a difference in their daily working lives?

Select the answer that comes closest to your situation.

☐ We can demonstrate that the change has a wide range of benefits beyond helping patients, for example by reducing waste, creating efficiency or making people's jobs easier.

☐ We can demonstrate that the change has some benefits beyond helping patients such as reducing waste and making jobs easier, but not a wide range.

☐ We can demonstrate that the change has one or two benefits beyond helping patients.

☐ The benefits that we have identified are only directly related to helping patients. We have not identified any other benefits that this initiative could bring.

2. Credibility of the benefits
   • Are benefits to patients, staff and the organisation visible?
   • Do staff believe in the benefits?
   • Can all staff clearly describe the a full range of benefits?
   • Is there evidence that this type of change has been achieved elsewhere?

Select the answer that comes closest to your situation.

☐ Benefits of the change are widely communicated, immediately obvious, supported by evidence and believed by stakeholders. Staff are able to fully describe a wide range of intended benefits for this initiative.

☐ Benefits of the change are not widely communicated or immediately obvious even though they are supported by evidence and believed by stakeholders.

☐ Benefits of the change are not widely communicated or immediately obvious even though they are supported by evidence. They are not widely believed by stakeholders.

☐ Benefits of the change are not widely communicated, they are not immediately obvious, nor are they supported by evidence or believed by stakeholders.
3. Adaptability of improved process
• Can the new process overcome internal pressures, or will this disrupt the change?
• Does the change continue to meet ongoing needs effectively?
• Does the change rely on a specific individual or group of people, technology, finance etc, to keep it going?
• Can it keep going when these are removed?

Select the answer that comes closest to your situation.

☐ The improved process can adapt to link in with and even support other organisational changes. It would not be disrupted if specific individuals or groups left the project. Its focus will continue to meet the improvement needs of our organisation.

☐ The improved process can be adapted to support wider organisational change but it would be disrupted if specific individuals or groups left the project. Elements of this work will continue to meet our organisations improvement needs.

☐ It would be difficult to adapt the new process to other organisational changes. It would cause disruption if specific individuals or groups left the project.

☐ The new process could not adapt if there was any other organisational change happening and it would be disrupted if specific individuals or groups left.

4. Effectiveness of the system to monitor progress
• Does the change require special monitoring systems to identify and continually measure improvement?
• Is there a feedback system to reinforce benefits and progress and initiate new or further action?
• Are mechanisms in place to continue to monitor progress beyond the formal life of the project?
• Are the results of the change communicated to patients, staff, the organisation and the wider healthcare community?

Select the answer that comes closest to your situation.

☐ There is a system in place to provide evidence of impact, including benefits analysis, monitor progress and communicate the results. This is set up to continue beyond the formal life of the project.

☐ There is a system in place to provide evidence of impact, including benefits analysis, monitor progress and communicate the results. This is not set up to continue beyond the formal life of the project.

☐ There is a system in place to provide evidence of impact and monitor progress. However none of this information is communicated more widely than the core project team. The measurement system is not set up to continue beyond the formal life of the project.

☐ There is only a very patchy system to monitor progress and this will end at the same time as the project. There is no system to communicate the results.
5. Staff involvement and training to sustain the process
   • Do staff play a part in innovation, design and implementation of the change?
   • Have they used their ideas to inform the change process from the beginning?
   • Is there a training and development infrastructure to identify gaps in skills and knowledge and are staff educated and trained to take the change forward?

Select the answer that comes closest to your situation.

- [ ] Staff have been involved from the beginning of the change process. They have helped to identify any skill gaps and have been able to access training and development so that they are confident and competent in the new way of working.
- [ ] Staff have been involved from the beginning of the change process and have helped to identify skills gaps but they have not had training or development in the new way of working.
- [ ] Staff have not been involved from the beginning of the change but they have received training in the new way of working.
- [ ] Staff have not been involved from the beginning of the change process and have not had training or development in the new way of working.

6. Staff behaviours toward sustaining the change
   • Are staff encouraged and able to express their ideas regularly throughout the change process and is their input taken on board?
   • Do staff think that the change is a better way of doing things that they want to preserve for the future?
   • Are staff trained and empowered to run small-scale tests (PDSA) based on their ideas, to see if additional improvements should be recommended?

Select the answer that comes closest to your situation.

- [ ] Staff are able to share their ideas regularly and some of them have been taken on board during the project. They believe that the change is a better way of doing things and have been empowered to run small scale test cycles (Plan, Do, Study, Act).
- [ ] Staff are able to share their ideas regularly and some of them have been taken on board during the project. They believe that the change is a better way of doing things. Staff do not feel empowered to run small scale test cycles (Plan, Do, Study, Act).
- [ ] Staff are able to share their ideas regularly but none seem to have been taken on board during the project. They don’t think that the change will be a better way of doing things. They don’t feel empowered to run small scale test cycles (Plan, Do, Study, Act).
- [ ] Staff do not feel they have been able to share their ideas. They do not believe that the change is a better way of doing things and they have not been empowered to run small scale test cycles (Plan, Do, Study, Act).
7. Senior leadership engagement and support

- Are the senior leaders trusted, influential, respected and believable?
- Are they involved in the initiative, do they understand it and do they promote it?
- Are they respected by their peers and can they influence others to get on board?
- Are they taking personal responsibility to help break down barriers and are they giving time to help ensure the change is successful?

Select the answer that comes closest to your situation.

- Clinical leaders are highly involved and visible in their support of the change process. They use their influence to communicate the impact of the work and to break down any barriers. Staff regularly share information with and actively seek advice from clinical leaders.

- Clinical leaders are highly involved and visible in their support of the change process. They use their influence to communicate the impact of the work and to break down any barriers. Staff typically don't share information with, or seek advice from clinical leaders.

- Clinical leaders are somewhat involved but not highly visible in their support of the change process. They use their influence to communicate the impact of the work but cannot be relied upon to break down any barriers if things get difficult. Staff typically don't share information with, or seek advice from clinical leaders.

- Clinical leaders are not involved or visible in their support of the change process. They have not used their influence to communicate the impact of the work or to break down any barriers. Staff typically don't share information with, or seek advice from clinical leaders.
Your Organisation

This section assesses the organisation's infrastructure and the change's fit with goals and culture.

8. Fit with the organisation's strategic aims and culture
• Are the goals of the change clear and shared?
• Are they clearly contributing to the overall organisational strategic aims?
• Is improvement important to the organisation and its leadership?
• Has the organisation successfully sustained improvement in the past?

Select the answer that comes closest to your situation.

- The goals of the change are clear and have been shared widely. They are consistent with and support the organisation’s strategic aims for improvement. The organisation has demonstrated successful sustainability of improvements before and has a ‘can do’ culture.

- The goals of the change are clear and have been shared widely. They are consistent with and support the organisation’s strategic aims for improvement. The organisation has not demonstrated success in sustaining previous improvements and does not have a ‘can do’ culture.

- The goals of the change are not really clear and they have not been shared widely. They have not been linked with the organisation’s strategy so we don’t know if they support any organisational aims for improvement. The organisation has not demonstrated success in sustaining previous improvements and does not have a ‘can do’ culture.

9. Infrastructure
• Are the staff fully trained and competent in the new way of working?
• Are there enough facilities and equipment to support the new process?
• Are new requirements built into job descriptions?
• Are there policies and procedures supporting the new way of working?
• Is there a communication system in place?

Select the answer that comes closest to your situation.

- Staff are confident and trained in the new way of working. Job descriptions, policies and procedures reflect the new process and communication systems are in place. Facilities and equipment are all appropriate to sustain the new process.

- Staff are confident and trained in the new way of working. However, job descriptions, policies and procedures do not reflect the new process. Some communication systems are in place. Facilities and equipment are all appropriate to sustain the new process.

- Staff are confident and trained in the new way of working. However, job descriptions, policies and procedures do not reflect the new process and there are no communication systems to adequately support the new process. Facilities and equipment are not appropriate to sustain the new process.

- Staff have not been trained in the new process and are not confident in the new way of working. Job descriptions, policies and procedures do not reflect the new process and there are no communication systems to adequately support the new process. Facilities and equipment are not appropriate to sustain the new process.

This survey has been adapted from the NHS Sustainability Model and Guide. The guide was developed by the NHS Institute for Innovation and Improvement and it can be found online at: http://www.qualitasconsortium.com/index.cfm/programs-services/sustainability/sustainability-model-and-guide/.