

Elevating Quality and Risk Management With Surge Learning

SHEPHERD VILLAGE

A Caring Christian Seniors' Community

Founded in 1961, Shepherd Village is Toronto's largest not-for-profit seniors' community, dedicated to meeting seniors' changing physical, spiritual, and social needs through quality care and compassionate service. Shepherd Village encompasses multiple facilities, including a long- term care home and independent living environments, and is home to hundreds of residents.

Within this dynamic and caring environment, Michelle Defante, Quality Manager at Shepherd Village, and the team work rigorously to maintain high standards for resident safety, person- centred care, and satisfaction.

Shepherd Village team uses SURGE, a unified, comprehensive platform integrating Quality Risk Management (QRM), a Learning Management System (LMS), and Policy Professional tools. This all-in-one solution centralizes training, streamlines audits, and enhances compliance, including policy and procedure management.

By leveraging the Surge platform, Shepherd Village is able to:

- ✓ Conduct regular equipment audits using customized QRM tools to ensure everything is functional and well-maintained
- ✓ Evaluate contracted service providers through a tailored QRM evaluation process to ensure they meet required standards
- ✓ Track and monitor annual staff training to support ongoing learning and compliance
- ✓ Reinforce Infection Prevention and Control (IPAC) protocols through targeted training modules
- ✓ Maintain high-quality dining experiences through a scheduled, multidisciplinary audit process built within QRM
- ✓ Store all policies and procedures in one centralized, easily accessible location using Policy Professional

The Challenge

Before fully utilizing Surge Learning's integrated platform, the team at Shepherd Village managed key tasks, such as compliance documentation, audits, policies, program and service evaluations, and staff training (including emergency preparedness) across various systems. While this approach worked, the team saw an opportunity to bring everything together in one accessible platform for greater efficiency.

As part of the home's strategic goal to go paperless and streamline operations, the team was looking for a more unified solution that would support accountability, simplify everyday processes, and make everything easier to manage in one place.

The Solution

Streamlined Audits and Action Plans

With Surge Learning's QRM module, the quality Lead can easily set up recurring audits and inspections for key areas like equipment, dietary services, environmental safety, IPAC, resident experience, program evaluations, and more. Once assigned, team members receive email reminders, and the tasks appear right on their dashboards, staying there until required tasks are completed.

After an audit, staff can document any areas that need improvement and outline the necessary action plans. Everything is recorded in one place, making it easy for the Quality lead to review and spot any trends that may need attention or follow-up.

Equipment Management

Through scheduled audits in the QRM module, Shepherd Village staff can proactively identify areas of concern and opportunities for improvement to prevent incidents and ensure resident safety. These audits allow team members to assess equipment thoroughly, document any issues, and follow up with necessary actions for quality improvement. By tracking and addressing these concerns, the team proactively maintains a safe and comfortable resident environment.

Contracted Services Monitoring

Shepherd Village ensures residents receive the best possible care and are satisfied with the services provided. The team annually evaluates all external providers and consultative services to support this. This includes foot care, food services, agency staffing, transportation, pharmacy, physiotherapy, diagnostics, and lab services.

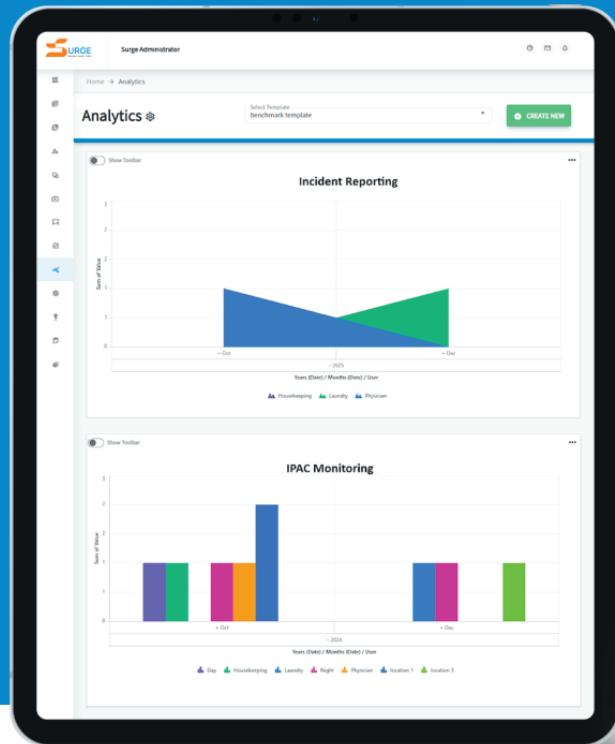
These evaluations help ensure that contracts are upheld and that resident care meets the highest standards. Through the QRM module, team members can conduct consistent evaluations that support quality improvement and capture whether the person served is satisfied with the services they receive.





Compliance and Training

Surge Learning also offers a full-featured LMS, offering a centralized online orientation hub for new hires, students, or volunteers, ensuring completion of essential training before arriving on-site. Annual reminders for mandatory training as per legislation and accreditation are managed within the platform so that staff stay current and can easily prove compliance when requested by the Ministry of Long-Term Care and Commission on Accreditation of Rehabilitation Facilities (CARF). Digital records replace binders, allowing quick, on-demand reporting during inspections or audits.



The Results

Improved Efficiency and Visibility

By consolidating audits, training, and policy documentation within Surge Learning's digital platform, staff save considerable time and easily access up-to-date information when needed. The Quality lead notes, "You don't have to run around the building looking for a binder," emphasizing how digital records put critical data at everyone's fingertips - no more chasing down paperwork. This streamlined approach not only frees up staff to focus on resident care but also enhances overall transparency and collaboration across the organization.

Enhanced Resident Safety and Quality of Care

Shepherd Village strongly focuses on creating a safe, high-quality environment for all residents. The QRM module in Surge Learning identifies equipment issues in real time, allowing for immediate corrective actions that help prevent avoidable incidents and promote resident safety.

Consistent evaluation and oversight of external service providers, such as pharmacy, physiotherapy, foot care, and diagnostics, ensure that all contracted services align with care standards and contribute positively to the resident experience.

Dining room audits, which integrate Infection Prevention and Control (IPAC) measures, also play a key role. These audits assess proper use of adaptive equipment, safe meal delivery, and overall dining practices. This attention to detail supports a safe, dignified, and person-centred mealtime experience that prioritizes health and satisfaction for every resident.

Simplified Compliance

Shepherd Village's streamlined system makes it easy to stay on top of training and audit requirements, whether for Ministry inspections or internal reviews. It simplifies compliance processes and helps the team stay organized, ensuring easy access to policies and procedures while making compliance maintenance more manageable and less overwhelming.

Proactive Risk Management

Scheduled QRM audits enable Shepherd Village to identify emerging trends and address minor issues before they escalate into larger concerns. This proactive approach not only enhances resident safety but also supports the home's commitment to continuous improvement. By regularly evaluating key areas like equipment maintenance, staff training, and service quality, Shepherd Village can quickly implement corrective actions and ensure that residents consistently receive exceptional care in line with the home's values of compassionate care, accountability, respect and excellence.

Higher Staff Engagement and Accountability

Staff across Shepherd Village see clear tasks and deadlines in their dashboards. With transparent action plans, individual team members take ownership of specific follow-ups, driving a culture of shared responsibility.

From scheduling annual audits on dining experience, IPAC, and emergency preparedness to ensuring mechanical lifts and shower chairs remain safe, Surge Learning is ingrained in Shepherd Village's daily operations. By embracing this integrated solution, Shepherd Village not only meets its regulatory requirements but also upholds its values of delivering compassionate, excellent, high-quality care for seniors. The community's success story underscores how a well-structured, technology-driven approach can simplify complex processes and enhance resident well-being.

Interested in learning how Surge Learning can transform compliance and staff engagement in your organization? Visit Surge Learning or contact a Surge specialist to discover how to streamline processes with Surge Quality Risk Management (QRM), Learning Management System (LMS), and Policy Professional.

