



# PATIENT SAFETY OFFICER PROGRAMME PARTICIPANT AGENDA

5-9<sup>th</sup> October 2015 – Mercure Southgate Hotel, Exeter

## Programme Objectives:

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At the conclusion of this programme, participants will be able to:

- Describe the skills, theory, and practical tools critical to developing a successful patient safety programme
- Participate in an ongoing patient safety executive international community of practice
- Learn how to use diagnostics and measures to determine the safety of your system
- Develop and implement a plan to improve safety at a systems/hospital/department/team level

## DAY 1: System of Improvement

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7:30 AM-  
8:30 AM **Breakfast (restaurant) and programme registration (Seymour Room)**

8:30 AM-  
8:45 AM **Welcome and Setting the Stage (Seymour Room)**  
*Carol Haraden, PhD, Frank Federico RPh and Allan Frankel, MD (IHI Faculty)*  
*Dr Rosie Benneyworth (Interim Managing Director SWAHSN)*  
During this session, participants will hear welcome and introductions. Faculty members will set expectations for the week and provide an overview of the Institute for Healthcare Improvement (IHI) and the South West Academic Health Science Network (SWAHSN).

8:45 AM-  
9:15 AM **Introduction to the SW Patient Safety Collaborative (Seymour Room)**  
*Amelia Brooks and Rob Bethune (SWAHSN)*  
An explanation of the full programme including how this training programme links in, how participants can connect with past and future participants and ongoing support available.

9:15 AM-  
10:15 AM **Framework for Patient Safety (Seymour Room)**  
*Allan Frankel, MD*  
Upon completion of this session, participants will be able to explain the components of patient safety that affect the environment of work and how they relate to each other.

10:15 AM-  
10:35 AM **Break (Reception)**

10:35 AM-  
10:50 AM **Case Study- 15 minutes (Seymour Room)**  
During this session, participants will be introduced to a patient safety case study.

10:50 AM-  
12:00 PM **Diagnostics for Patient Safety (Seymour Room)**  
*Carol Haraden, PhD*



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Upon completion of this session, participants will be able to describe and diagnose whether a safety issue is a systems problem or special cause variation, and apply the appropriate remedy.

12:00 PM-  
1:00 PM

**Lunch (Restaurant)**

1:00 PM –  
2:15 PM

**Model for Improvement (Seymour Room)**

*Carol Haraden, PhD*

Upon completion of this session, participants will be able to describe and use the Model for Improvement as foundation for all quality improvement efforts. Participants will also be able to identify a project aim and measures.

2:15 PM-  
3:15 PM

**Testing and Simulation (Seymour Room)**

*Allan Frankel, MD, and Carol Haraden, PhD*

Upon completion of this session, participants will be able to describe and apply the Model for Improvement methodology using a group problem solving simulation.

3:15 PM-  
3:30 PM

**Break (Reception)**

3:30 PM-  
3:45 PM

**Break and Introduction to Planning Form (Seymour Room)**

*Allan Frankel, MD*

3:45 PM-  
4:30 PM

**Introduction to Life Improvement Software (Seymour Room)**

*Amelia Brooks, SWAHSN*

4:30 PM-  
5:30 PM

**Free time to review learning, check in to accommodation etc**

6:00 PM-  
7:00 PM

**Drinks reception (Hotel Bar)**

7:00 PM-  
9:00 PM

**SWAHSN hosted dinner (Restaurant)**



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## DAY 2: Measurement for Improvement

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7:30 AM-  
8:30 AM **Breakfast (Restaurant)**

8:30 AM-  
8:45 AM **Questions, Review Plans for the Day (Seymour Room)**  
*All faculty*

8:45 AM-  
9:45 AM **Monitoring and Measurement Framework (Seymour Room)**  
*Carol Haraden, PhD*

Participants will become familiar with the framework that provides a structured approach to monitoring and measurement in patient safety improvement work.

9:45 AM-  
10:00 AM **Break (Reception)**

10:00 AM-  
11:15 AM **Run Charts and SPC Charts (Seymour Room)**  
*Carol Haraden, PhD*

During this session, participants will learn how to review and analyse improvement data through the use of run charts and statistical process control charts. They will also learn how this type of analysis can then inform the development of further tests of change and contribute to the success of the improvement project as a whole.

11:15 AM-  
12:00 PM **Collecting Data (Seymour Room)**  
*Carol Haraden, PhD*

Participants will spend time looking at the different opportunities and challenges involved in collecting data for improvement.

12:00 PM-  
1:00PM **Lunch (Restaurant)**

1:00 PM-  
3:00 PM **Driver Diagrams (Seymour Room)**  
*Allan Frankel, MD*

Upon completion of this session, participants will be able to describe a driver diagram and visually depict their theories of what changes will create the outcome of interest.

3:00 PM-  
3:15 PM **Break (Reception)**

3:15 PM-  
4:30 PM **Work Period (Seymour Room)**  
*All Faculty*



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This is a working session to allow participants time to work on their driver diagrams and project planning forms.

6:00 PM-  
8:00 PM **Walking tour of Exeter guided by Exeter Redcoats (meet in Reception)**

### **DAY 3: Safety Culture**

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7:30 AM-  
8:30 AM **Breakfast (Restaurant)**

8:30 AM-  
8:45 AM **Questions, Review Plans for the Day (Seymour Room)**  
*All faculty*

8:45 AM-  
9:45 AM **Introduction to Teamwork and Culture (Seymour Room)**  
*Allan Frankel, MD*  
Upon completion of this session, participants will be able to explain the most important components of successful teamwork.

9:45 AM-  
10:00 AM **Break**

10:00 AM-  
11:00 AM **Teamwork and Culture continued (Seymour Room)**  
*Allan Frankel, MD*  
Upon completion of this session, participants will be able to explain the components of a fair and just culture and apply the Just Culture algorithm to a case.

11:00 AM-  
12:15 PM **Building a Culture of Safety (Seymour Room)**  
*Allan Frankel, MD*  
Upon completion of this session, participants will be able to describe the concepts behind building a culture of safety including learning boards.

12:15 PM-  
1:15 PM **Lunch (Restaurant)**

1:15 PM-  
2:15 PM **Measurement of Culture (Seymour Room)**  
*Allan Frankel, MD*

2:15 PM-  
3:45 PM **Engaging Others (Seymour Room)**  
*Frank Federico, RPh*

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Participants will spend time exploring the challenges of engaging others based on their own experiences and the experiences of others. The group will then look at potential solutions to this challenge focusing on engaging clinicians, middle managers and senior leaders. This session includes a refreshment break.

3:45 PM-  
4:30 PM **Work Period (Seymour Room)**

*All Faculty*

This is a working session to allow participants time to work on their driver diagrams and project planning forms.

6:00 PM-  
9:00 PM **World Cup Rugby match in the Fanzone at Notherhay**

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### DAY 4: Human Factors & Teamwork

7:30 AM-  
8:30 AM **Breakfast (Restaurant)**

8:30 AM-  
8:45 AM **Questions, Review Plans for the Day (Seymour Room)**

*All faculty*

8:45 AM-  
10:15 AM **Human Factors and Technology (Seymour Room)**

*Frank Federico, RPh*

Upon completion of this session, participants will be able to explain two methods to assess the work environment for human factors violations, list three factors that influence human performance, and describe possible remedies to address those violations.

10:15 AM-  
10:35 AM **Break (Reception) and field exercise**

10:35 AM-  
12:30 AM **Reliable Design (Seymour Room)**

*Frank Federico, RPh*

Participants will learn the key components of a highly reliable system and discuss the application of reliability principles to improving patient safety. Participants will practice designing reliable processes through a number of exercises.

12:30 AM-  
1:30 PM **Lunch (Restaurant)**

1:30 PM-  
5:00 PM **Human Factors and Behaviour (Seymour Room)**

*Phil Higton, Amelia Brooks, Rob Bethune and Frank Federico, RPh*



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During this session, participants will explore the relationship between ‘systems and processes’ and ‘people and culture’ with a specific focus on behavioural human factors. The session will focus particularly on the behavioural human factors needed to drive improvement in a system through a better understanding of people and culture. This session includes a refreshment break.

6:00 PM-  
7:00 PM **Hosted drinks reception (Hotel Bar)**

7:00 PM-  
10:00 PM **SWAHSN hosted dinner and graduation ceremony (Restaurant)**

### **DAY 5: Senior Leaders & Patient Safety**

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7:30 AM-  
8:30 AM **Breakfast (Restaurant)**

8:30 AM-  
8:45 AM **Questions, Review Plans for the Day & Welcome Senior Leaders (Seymour Room)**  
*All faculty*

8:45 AM-  
10:15 AM **Attendees meet to work with their leaders on safety plan (Seymour Room)**  
*Carol Haraden, PhD, Frank Federico, RPh, and Allan Frankel, MD*  
During this session, participants will meet to review their safety plans and will revise them together. Participants and Senior Leaders will share their learning.

10:15 AM-  
10:45 AM **Break (Reception)**  
Hotel guests to check out of guest rooms. Senior leaders transition to Terrace Room.

10:45 AM-  
12:00 PM **Spread and Scale : Where do we go from here? (Seymour Room)**  
*All faculty*  
Fostering the adoption of successful change ideas and integrating spread and scale into the sequence of improvement. Participants and Senior Leaders will work together on their spread and scale plans.

12:00 PM **Reflections, evaluation, programme close at 12:30** (packed lunches available for participants)

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### Faculty Biographies

*Consistent with the IHI's policy, faculty for this conference are expected to disclose at the beginning of their presentation(s), any economic or other personal interests that create, or may be perceived as creating, a conflict related to the material discussed. The intent of this disclosure is not to prevent a speaker with a significant financial or other relationship from making a presentation, but rather to provide listeners with information on which they can make their own judgments. Unless otherwise noted below, each presenter provided full disclosure information, does not intend to discuss an unapproved/investigative use of a commercial product or device, and has no significant financial relationship(s) to disclose. If unapproved uses of products are discussed, presenters are expected to disclose this to participants.*



**Carol Haraden, PhD**, Vice President, Institute for Healthcare Improvement (IHI), is a member of the IHI team responsible for developing innovative designs in patient care. She currently leads IHI's work with Health Improvement Scotland aimed at transforming the safety of every Scottish hospital over five years. She also leads work in Denmark, the South of England, and the USA to improve the safety of healthcare systems in these countries. Dr. Haraden is the executive lead for the IHI Patient Safety Executive Development Programme. She has been a dean in higher education, a clinician, consultant, and researcher. She served on the Institute of Medicine Committee on Engineering Approaches to Improve Healthcare, is a judge for several national quality awards, and is an associate editor for the journal, *BMJ Quality and*

*Safety.*



**Frank A. Federico, RPh, Frank Federico, RPh**, Executive Director, Institute for Healthcare Improvement (IHI), works in the areas of patient safety, and the application of reliability principles in health care. He is faculty for the IHI Patient Safety Executive Training Program and co-chaired a number of Patient Safety Collaboratives. Prior to joining IHI, Mr. Federico was the Program Director of the Office Practice Evaluation Program and a Loss Prevention/Patient Safety Specialist at Risk Management Foundation of the Harvard Affiliated Institutions, and Director of Pharmacy at Children's Hospital, Boston. He has authored numerous patient safety articles, co-authored book chapters in *Achieving Safe and Reliable Healthcare: Strategies and Solutions*, and is an Executive Producer of "First, Do No Harm, Part 2: Taking the Lead." Mr. Federico serves as Chair of the National Coordinating Council for Medication Error Reporting and Prevention (NCC-MERP), and vice-chair of the Joint Commission Patient Safety Advisory Group. He coaches teams and lectures extensively, nationally and internationally, on patient safety.



**Allan S. Frankel, MD**, is a Principal in Safe & Reliable Healthcare, a group that works in patient safety, quality, organizational learning, leadership coaching and teamwork. He was one of the founders of Pascal Metrics Inc. and served for 6 years as its Co-Chief Medical Officer. Prior to that for 7 years he was the Director of Patient Safety for Partners Healthcare in Boston. He practiced pediatric, cardiac and general anesthesia in academic and private institutions before embarking on a journey to study and improve patient safety and healthcare reliability. Throughout he has been on the faculty of the Institute for Healthcare Improvement co-chairing Safety Collaboratives, teaching in IHI's Patient Safety Executive Officer Development Program, and as faculty on the UK's Safer Patients Initiatives and Scotland Patient Safety Program. Dr. Frankel has worked to improve the safety and reliability of health systems from Singapore to Saudi Arabia, in every state in the USA and all the provinces of Canada.