

Roamers, Road Shows and Boot Camps: An Innovative Approach to Learning and Change Management

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Background

In late 2007, we began provincial implementation of BC Patient Safety & Learning System (BCPSLS), a web-based adverse event reporting system for the province. During our pilot, we developed, tested and evaluated different ways to raise awareness about patient safety and safety culture and train staff and leaders to use our online safety event reporting and learning tool. Over the past two years, we have added some innovative and effective learning methods.

Healthcare Administration in BC

BC is divided into six health authorities (HA), five of which - Fraser, Interior, Northern, Vancouver Coastal and Vancouver Island - are geographically defined. The sixth, Provincial Health Services Authority, administers specialty services throughout the Province.



Figure 1. Areas covered by the five geographic health authorities.

Objective

How can we effectively deliver consistent patient safety education and technical training to a wide audience of diverse users across large geographic areas, at acute, residential and community sites in urban, rural and remote settings?

Methods

Site representatives with expertise and credibility in their organizations are seconded to lead local training. Train-the-trainer 'Boot Camps' - intense sessions - prepare them to manage change, engage staff, promote safety culture and teach system use. Managers receive 'Mini-Boot Camp' training, including hands-on classroom training with a focus on their role in fostering reporting and learning. Reporters are trained 'just-in-time' following system Go Live onsite in their clinical areas. 'Roamers' - roving Safety Champions - lead 'Traveling Road Shows' - visible, high-energy teams - and gather small groups around computers to talk about patient safety and the new system. We have developed and offer elearning tools, quick reference guides and webpages, allowing users in all settings access to learning materials on demand.

Safety Learning Snapshots from Around the Province

✓ Roamers

Roving Safety Champions lead 'Traveling Road Shows', then take their knowledge back to their clinical areas.



✓ Reporter Training

'Just-in-time' training is delivered onsite in clinical areas.



✓ Branding

Targeted messaging helps BCPSLS make sense to all involved in patient safety. In the lab, *the specimen is the patient*.



✓ eLearning and Tools

Users in all settings have easy access to learning materials on demand.



✓ Boot Camps

Intense sessions prepare leaders to manage change, engage staff, promote safety culture and teach system use.



✓ Manager Training

Hands-on classroom training focuses on each person's role in fostering a culture of safety.



Results

Hundreds of managers from five BC Health Authorities have been trained to follow-up safety events using our methods and approximately 80% of front-line staff have received reporter training. Online evaluation indicates that reporters feel well-prepared to use the system and provides us with feedback to continually improve our approach and tools.

System adoption is strong; reporting rates continue to climb monthly. Review of reports in our safety events database shows good consistency in reporting and follow-up practices and allows us to address issues through our training. Follow-up documentation shows greater emphasis on systems thinking, basic root cause analysis, learning and change, and a decrease in the use of punitive or blaming language.

Discussion

Reporters find our on-site approach to training respectful as the learning does not interfere with their clinical work and is contextual and relevant.

Safety Champions play key roles not just in implementation but in sustaining the changes in the longer term by acting as ongoing resources to staff in their clinical areas.

Managers require significant coaching on a non-punitive approach to follow-up that promotes learning, and on the importance of giving feedback to reporters to encourage future reporting behaviours. Coaching to managers can be just-in-time and event-specific or delivered through more regular contact and support. A shift in leadership priorities is sometimes needed to allow managers the time necessary to conduct thorough follow-up and give feedback to reporters and teams.

Familiarizing local site representatives with the concept of safety culture and preparing them to lead training and support users is essential to long-term ownership of the system and vital to sustainability.

Our multi-faceted and creative approach to learning has been effective in reaching a wide, diverse user group. Post-implementation, ongoing learning activities and support are critical to sustainability to help users move from reporting to learning and to enable quality improvement and system change based on the data.

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