

# Rethinking Patient Safety

## Navigating the Measurement and Monitoring Safety Clouds: A Leaders' Self-reflection and Discussion Activity

### The activity

Senior leaders and board members are key champions for [Rethinking Patient Safety](#)<sup>1</sup>. This activity encourages self-reflection and discussion by these leaders across all sectors of healthcare in the five domains of the [Measurement and Monitoring of Safety Framework](#)<sup>2</sup> (MMSF), which has formed the foundation for Rethinking Patient Safety. While we have made progress on reporting and learning from harm, it is now time to maximize learning from other sources of safety information.

### What are safety cloud themes?

The exercise involves exploring all five domains of the MMSF (past harm, reliability, sensitivity to operations, anticipation & preparedness, and integration & learning) using safety clouds. Each safety cloud comprises two themes for which leaders may first self-reflect and then hold reflective conversations (Figure 1).

The themes in each safety cloud represent common challenges healthcare organizations may face as they move toward Rethinking Patient Safety and evolve their approach to measuring and monitoring safety. Each safety theme is explained in detail in the PowerPoint presentation and workbook that accompany the activity card. Some of the themes will resonate with you more than others. Your organization may have denser clouds for one or two themes.



**Figure 1: Measurement and Monitoring Safety Clouds and Safety Themes**

# Why host a leader's self-reflection and discussion?

Rethinking Patient Safety encourages us to recognize that everyone contributes to patient safety. As senior leaders and board members in your organizations, it is important to understand how you may support creating environments for safety, to ensure improvement efforts are part of learning from harm as well as other sources of safety intelligence, and that everyone has an opportunity to contribute to safer care. Self-reflection on your role as leaders and the questions you can ask yourself and others is an important starting point to create safer care. While we have learned a lot about safety in the past two decades, we have not progressed in ways that we had hoped. Now is the time for Rethinking Patient Safety and to lead the change towards safer care for all.

Participating in this activity provides an opportunity for your own continuing professional development. You can use the Participant Workbook in accreditation and interviews with regulators to demonstrate how you, as a leader, are learning.

## How to host a leader's self-reflection activity

### Time required:

- 5–10 minutes to prepare, plus 20 to 30 minutes discussion time per safety theme.
- We recommend you break down the exercise into bitesize chunks. You might choose to focus on one safety cloud and its key themes in each reflective leadership conversation. Alternatively, you could explore a single theme from a safety cloud during each session, then revisit the next theme in subsequent meetings, retreats or other forums for ongoing discussion. What matters is that you have an honest, open and inclusive conversation about the challenges related to each safety theme and associated question.
- **Do not** try to have reflective conversations about all 10 themes in one session. A series of deeper, more meaningful conversations spread over time will enable you to thoroughly explore each safety theme.

### Whom to include:

- The goal is for senior leaders and/or board members from a healthcare organization to come together and create space and opportunity to self-reflect and have safety conversations where several perspectives are shared. While you may self-reflect and then discuss with as few as 2–3 others, the goal is to ensure that many people are able to share their perspectives from their fields of view.

## How to plan your event

- Identify a facilitator. Their role is to create a safe and welcoming environment that encourages participants to share and learn.
- The facilitator should be prepared to support participants through difficult and sensitive conversations. Identify available resources to support participants if the need arises. Trauma-informed training resources<sup>3,4</sup> may be helpful as you prepare to host this activity.
- The facilitator will introduce the purpose of the activity, the safety cloud(s) and safety theme(s) and provide a brief background on the MMSF domain from which the safety cloud and safety theme come (this is included in the PowerPoint materials provided).
- Determine the format for hosting the activity. Think about existing forums that could be leveraged to host this activity, such as a Board or senior leadership meeting. Alternatively, you may want to include this activity at a senior leaders' retreat.
- Decide when to hold your reflective conversations.

## Tools you will need

- The workbook that accompanies the activity to guide the discussion and capture individual reflections and group discussions
- The PowerPoint slide deck or specific slides that accompany the activity card. We recommend spreading the reflective conversations out over time. You therefore only need the PowerPoint slides from the slide deck that relate to the safety cloud(s) and safety theme(s) you are exploring.
- Facilitation tools, such as sticky notes, a flip chart, markers, a white board, etc.
- A method for recording the discussion and actions that come out of the conversation
- Your workbook, which is useful for keeping a record of what you learned from the reflective conversation, what surprised you and what you are taking away from the conversation

## Hosting the activity

- We recommend you open the session by emphasizing the importance of creating a non-judgmental, inclusive, safe space where all participants are confident their perspectives will be heard and where all experiences are considered.
- This activity can be performed by using a huddle or tabletop format. It can also be hosted virtually using a platform like Zoom or MS Teams.
- Introduce the participants to the importance of taking time to reflect on the common challenges healthcare organizations face with measuring and monitoring safety as they are rethinking patient safety. Conversation is learning!

- Decide which safety cloud and safety theme you will focus on. To help prioritize the order in which you discuss the questions, you may choose to give participants the opportunity to vote on which of the safety themes and associated safety questions to start with.
- Using the applicable PowerPoint slides, share details about the MMSF domain, safety cloud, safety theme and the related question you are discussing.
- Give participants five minutes to self-reflect and record their reflections in their workbook.
- Once you have confirmed they are ready, open the floor for group conversation.
  - Discuss as a group how you currently answer the question pertaining to the MMSF domain (e.g. Is care safe today?).
  - Ask participants to share their insights and thoughts on the reflective question(s).
  - Discuss as a group how you could do a better job in the future of answering the MMSF domain question (e.g. Is care safe today?).
  - Discuss what steps you, as leaders, can take to move your organization forward on the safety cloud theme being discussed. Remember, the safety clouds capture common challenges all organizations face when measuring and monitoring safety – you are not doing anything wrong. Having the conversation is part of creating a way forward, through the safety clouds, to an approach that reflects Rethinking Patient Safety and the MMSF.
  - Discuss how you can take what has been shared in the conversation to help move forward and advance your approach to safety measurement and monitoring.
  - Decide who is leading on action items and make a note of what has been agreed. The workbook is useful for this.

## Tips for success

1. Foster a welcoming environment that promotes psychological safety, creating an open, inclusive space that encourages everyone to share and learn.
2. Ensure you have the appropriate equipment (e.g. PowerPoint slide deck linked to this activity and a room or virtual space where you can share the slides).
3. Think of some examples from your own organization to frame the conversation. Local examples provide context and get the conversation off the ground.
4. Reassure participants that it is to be expected that their conversation will identify gaps. The important thing is for leaders to take time to self-reflect on how they lead for safety, and to engage in conversations with other leaders to seek varying perspectives for each of the challenges identified in the safety clouds. There is no expectation of perfection.

## Debrief

Following completion of this activity, you may want to debrief with the activity participants to determine the meeting's success and opportunities for improvement.

### Consider asking:

- What went well?
- Even better if...
- Next time try this...

## References

- 1 Vincent C, Burnett S, Carthey J. The measurement and monitoring of safety. The Health Foundation; 2013. Accessed July 12, 2024 from <https://www.health.org.uk/publications/the-measurement-and-monitoring-of-safety>
- 2 Gilbert R, Asselbergs M, Davis D, et al. Rethinking patient safety: A discussion guide for patients, healthcare providers and leaders. Healthcare Excellence Canada; 2023. Accessed July 12, 2024 from <https://www.healthcareexcellence.ca/media/gx4l3idd/rethinking-patient-safety.pdf>
- 3 [Trauma Training Initiative | Alberta Health Services](#)
- 4 [Trauma- and Violence-Informed Care Foundations Curriculum - EQUIP Health Care | Research to Improve Health Equity](#)