

**CLINICAL HUMAN FACTORS GROUP  
BUSINESS PLAN 2007-2009**

**DRAFT**

## **BACKGROUND**

The Clinical Human Factors Group (CHFG) was set up in 2007 by Martin Bromiley, a commercial airline pilot and the husband of Elaine Bromiley, who sadly died during a routine operation. The CHFG is based on the Royal Aeronautical Society Human Factors Group; an independent expert body working in aviation that has been hugely successful in raising awareness of human factors and embedding it in aviation training and practice.

Comprising a wide range of stakeholders, including healthcare professionals, airline pilots, commercial training providers, human factors specialists, policy makers and senior healthcare managers, the Clinical Human Factors Group aims to raise awareness of human factors in healthcare, and ensure it is embedded in the design and everyday practice of healthcare staff.

Membership of the CHFG is open to stakeholders who have an interest or expertise in human factors in healthcare. The CHFG's members are volunteers who are committed to supporting the group's work, and in doing so, working collaboratively to improve patient safety. Members of the CHFG, whether they are clinicians, policy makers, pilots or healthcare managers have recognised the vital contribution that human factors can make to improving patient safety in healthcare.

This document summarises the CHFG's Business Plan for 2007-2009. It has been developed on the basis of a seminar held on 8<sup>th</sup> June, 2007 and initial discussions that have taken place between representatives of the CHFG and the Department of Health. The Business Plan outlines the CHFG's core goals for the period from October 2007- October, 2009.

## **OUR VISION**

The Clinical Human Factors Group's vision is to engender human factors thinking in the hearts and minds of all healthcare staff and stakeholders, from board to ward and beyond...

## **OUR MISSION STATEMENT**

**"Our goal is to understand how humans interact with their environment and those around them, and to use this to improve patient safety by reducing the possibility and impact of errors."**

## **OUR GOALS**

Between October 2007 and October 2009 the Clinical Human Factors Group will work towards achieving three core goals that were identified as potential work streams in a seminar held in June 2007.

- 1. To develop an evidence-base to demonstrate the role human factors plays in patient safety.**
- 2. Raise awareness across the NHS of the important role human factors plays in improving patient safety.**
- 3. Campaign for human factors training to be included in the curricula and training that is delivered to wide range of healthcare staff.**

In addition, members of the Clinical Human Factors Group will also act in an advisory capacity, sharing their human factors knowledge and support other stakeholders with an interest in human factors.

Each of the 3 core goals of the Clinical Human Factors Group is described in more detail in the following sections of the Business Plan, together with their milestones and deliverables.

## **Goal 1: To develop an evidence-base to demonstrate the role human factors plays in patient safety.**

Developing an evidence-base that persuades healthcare stakeholders of the key role that human factors plays in patient safety is an essential first goal for the Clinical Human Factors Group. The CHFG recognises that the human factors evidence-base needs to be developed with a broad range of stakeholders in mind and therefore a detailed stakeholder analysis will be carried out at the outset. This will ensure that different formats and types of evidence-base are developed appropriate to a wide range of groups.

In terms of the evidence-base, the CHFG will develop a toolkit or database of case studies describing where human factors methods have improved patient safety. This will include evidence from research studies, near misses or 'saves of the week', human factors stories, safety solutions, testimonies of healthcare staff working in the field, case studies of departments or healthcare settings where human factors is embedded etc.. Both healthcare and non-healthcare examples will be collated.

Developing an evidence-base is THE essential first goal for the CHFG because it will equip the Group with an armoury of HF evidence that can be used to persuade healthcare staff of the importance of human factors in patient safety. Hence, it is the foundation upon which we can build to achieve our other core goals. The key milestones, timescales and deadlines for achieving this goal are summarised in Table 1.0.

*Table 1.0: Key milestones, timescales and deadlines for developing a human factors evidence-base.*

| <b>Key milestones:</b>   | <b>Timescales and deadlines</b>  |
|--|--|
| i. Contact stakeholders to contribute stories, research, case studies etc.. to the evidence base | October 2007   |
| ii. Stakeholders to respond to the call for evidence and contribute their materials.             | 12 <sup>th</sup> November 2007   |
| iii. Data analysis of the human factors evidence.  | To be carried out between 13 <sup>th</sup> November and January 31 <sup>st</sup> 2008.   |
| iv. Stakeholder analysis   | To be carried out between 13 <sup>th</sup> November and December 31 <sup>st</sup> , 2007 |
| v. Draft report on evidence base   | Deadline of February 29 <sup>th</sup> , 2008   |
| vi. Dissemination and communication of the final human factors evidence-base                     | April 1 <sup>st</sup> , 2008 and throughout 2008/2009.                                   |
| vii. Review human factors evidence   | March 31 <sup>st</sup> 2009.   |

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| base (to ensure that it is up-to-date) |  |
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## **Goal 2: Raise awareness across the NHS of the important role human factors plays in improving patient safety.**

By speaking at conferences, developing a dedicated website ([www.chfg.org.uk](http://www.chfg.org.uk)), writing media and journal articles and presenting to front-line clinical staff and managers, the CFHG aims to spread the message about human factors and patient safety. Throughout 2008-2009 members of the Clinical Human Factors Group will identify opportunities to raise awareness of human factors in the NHS and work towards increasing the number of healthcare stakeholders who recognise the crucial role human factors plays in the delivery of safe patient care.

One potential opportunity is to link this work stream with the national patient safety campaign that is planned in the recommendations of *Safety First*. Furthermore, in line with recommendation 13 of *Safety First*, patient champions, like Martin Bromiley will spread the message about human factors by describing their experiences to NHS staff.

The key milestones/tasks, timescales and deadlines associated with this goal are summarised in Table 2.0.

*Table 2.0: Key milestones, timescales and deadlines for raising awareness of the role of human factors in improving patient safety.*

| <b>Key milestones/tasks:</b>   | <b>Timescales and deadlines</b>                     |
|--|---|
| i. Develop and test a Clinical Human Factors Group website ( <a href="http://www.chfg.org">www.chfg.org</a> )        | To be completed by November 30 <sup>th</sup> , 2007 |
| ii. Write a journal article for submission to BMM.   | 31 <sup>st</sup> January, 2008                      |
| iii. Identify opportunities at conferences, teaching sessions, for journal and media articles                        | To be carried out throughout 2007-2009              |
| iv. To formalise a link between the CHFG and the Patient Safety Campaign described in Safety First                   |   |
| v. To broaden the membership and engagement in the CHFG and move beyond engaging enthusiasts to converting sceptics. | To be carried out throughout 2007-2009.             |

### **Goal 3: Campaign for human factors training to be included in the curricula and training that is delivered to wide range of healthcare staff.**

Embedding human factors training into healthcare curricula, staff inductions and other training forums is essential to create a culture where human error and systems failures are fully appreciated. The third core goal of the Clinical Human Factors Group therefore involves campaigning for human factors training to be an integral part of training for healthcare professionals. By 'healthcare professionals' we mean senior managers, policy makers, board members, clinicians and non-clinical staff who all play a role in ensuring patients are treated in a safe environment.

The term 'human factors training' encompasses many different types of training content, for example, crew resource management training, training on systematic incident investigation methods or prospective risk assessment techniques, simulator-based team training and educational sessions which introduce key human factors theories and methods.

The CHFG recognises that the human factors training needs will vary widely across different types of healthcare stakeholder, for example, healthcare managers versus clinicians. We also recognise that further discussion is needed on how to prioritise HF training in the NHS, which is the third largest organisation in the world after the Chinese army and Indian railway network. The diversity of staff groups, role types and complexity of the NHS as a system requires a systematic appraisal of what types of training is needed by different groups, when it should be delivered, how, by whom, and what materials are best suited to meet training needs. Data from Goal 1, the development of an evidence-base to demonstrate the role of human factors on patient safety will provide a starting point from which we can appraise staff training needs.

The CHFG strongly believes that human factors training has an important role to play in creating an open and fair, risk aware culture in the NHS. Table 3.0 summarises the key milestones/tasks, timescales and deadlines for achieving Goal 3.

Table 3.0: Key milestones, timescales and deadlines for campaigning for human factors training.

| Key milestones/tasks:  | Timescales and deadlines   |
|--|--|
| i. Data analysis of the human factors evidence base (with a specific work stream on human factors training). <ul style="list-style-type: none"> <li>➤ Review the different types of HF training that have been developed and delivered for healthcare staff.</li> <li>➤ Collate evidence on what has worked and what has not worked.</li> <li>➤ Appraise evidence on its effectiveness, i.e. has the training clearly demonstrated changes in culture and practice, and if so, have these been sustained over time?</li> </ul> | To be carried out between 13 <sup>th</sup> November and January 31 <sup>st</sup> 2008. |
| ii. Draft report on evidence base  | Deadline of February 29 <sup>th</sup> , 2008   |
| iii. Training needs analysis of human factors training needs amongst healthcare stakeholders. <ul style="list-style-type: none"> <li>➤ Identify opportunities to embed HF training in healthcare education curricula and consider retraining needs for different groups of staff.</li> <li>➤ Identify and build a core-curriculum for HF/CRM Training (if appropriate).</li> </ul>   | March 1 <sup>st</sup> , 2008 to 31 <sup>st</sup> July, 2008                            |
| iv. Training needs analysis report disseminated to key stakeholders  | September 2008   |
| v. Campaigning by CHFG to include human factors training in the curricula and training programmes of specific groups of staff  | October 2008- onwards  |
| vi. Evaluation of impact of training needs analysis and related campaigning for the inclusion of HF training for healthcare staff.   | 31 <sup>st</sup> , October 2009  |

## FINANCE

The Clinical Human Factors Group comprises volunteers who give their time freely because they believe in the importance of human factors in improving patient safety.

As a voluntary body we have no dedicated budget as such and therefore rely on contributions from national agencies and professional bodies.

In November 2008 the CHFG submitted an application to attain charitable status. We are awaiting the outcome of this application at the time of writing this report.

Our current budget for the year ending December 31<sup>st</sup>, 2007 is £5,000 which was donated by The Health Foundation. This money is being used to fund the Group to meet and pay the travel expenses of its members. We are continuing to seek funding to support our activities in 2008 and 2009.

## **EVALUATING OUR SUCCESSES**

The Clinical Human Factors Group is committed to evaluating its performance so that we can learn where we have succeeded and where we can learn lessons about our approach to shape future initiatives. The CHFG will therefore carry out an annual review of performance against the milestones and deliverables specified in this Business Plan. In doing this we will collate data on barriers and enablers to embedding human factors in the NHS and will share our findings with other stakeholders who have a role in improving patient safety. During 2008 the CHFG will seek to build links with research teams engaged in patient safety research who would be willing to support our evaluation activities.