Healthcare Improvement Scotland

Scottish Patient Safety Programme: Mental Health

Safety Climate resources: Guidance

NHS SCOTLAND

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Published June 2023
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What is safety climate?

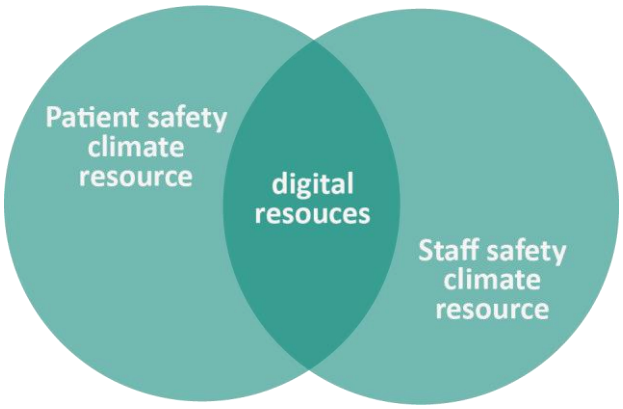
Safety culture has been shown to be a key predictor of safety performance in several industries. It is the difference between a safe organisation and an accident waiting to happen. Thinking and talking about our safety culture is essential for us to understand what we do well, and where we need to improve.

Safety climate is a measurement of the safety culture in an environment at a particular point in time.

This resource is designed to help you measure safety climate and will allow you to

- understand your system at a specific point in time
- describe the presence or absence of safety
- identify good practice and
- identify areas for improvement

What is included in this resource?



Patients

The Patient Safety Climate Resources for mental health are a set of questions designed by people with lived and living experience and given to people to assess different aspects of safety in a ward or unit.
An accessible version of the questionnaire has been developed for patients with communication difficulties.

Access the patient safety climate questionnaire here

Access the patient safety climate questionnaire: accessible version here

Staff

The Staff Safety Climate Resources provides information about the perceptions of front-line clinical staff about safety in their clinical area and leader's commitment to safety.

Access the staff safety climate questionnaire here

Digital templates

Digital templates have been provided using MS Teams forms for both Staff and Patient Safety Climate Resources. These can be used on any device, including tablet and mobile phone. The resource can be completed digitally, independently or with a help of a facilitator.

Access the instructions for using the digital resource here

Access the patient safety climate questionnaire here

Access the staff safety climate questionnaire here

How to use this resource

This resource allows the measurement of safety climate in your team and experienced by the patients who use your service. It provides tools for use with staff members, individually with patients with lived and living experience and in groups.
You can choose to administer the resources in various ways and with various frequency. Some options are suggested in the table below.
It is recommended that the resource is discussed with the team and a consistent approach agreed.

Options to use this resource

Option 1:1-1 Questionnaire	Option 2: Groups	Option 3: Digital
Completed by individuals. This may or may not be facilitated.	Compare similar and different views within a group.	Completed by individuals using the digital template in this resource. This may or may not be facilitated.

Frequency

Patients

We recommend that safety climate is measured several times a year or more often as required. For patients, it should not be used at a set point in the clinical process, such as at admission or discharge, but at various points during their journey. The Patient Safety Climate Resources are designed for use with a mixed group of patients at a specific point in time, as this provides more varied responses.

Staff

For staff, we suggest obtaining a baseline safety climate measure, and then conducting follow up questionnaires at 6 months and 12 months. This is recommended for areas with ongoing programmes of improvement as the staff results may provide outcome or balancing measure data.

Key points for facilitators

It is recommend that an external facilitator to the team or ward is used to carry out the safety climate discussions. For staff the facilitator role is key when using the NHS Education for Scotland (NES) safety discussion cards and providing feedback following a cycle of the staff safety questionnaire. This will allow all of the team members to participate fully.
For patients, it is also recommended that an external facilitator is used when using the group discussion tool or questionnaire. In a number of NHS board areas this facilitation is provided by a Third Sector organisation.

Suggested guidance for facilitators

- A statement on why we measure safety climate, the anonymous nature of the responses given and that all information shared is used for continually improving the safety and quality of care. Introduce the group exercise format or questionnaire format
- If using one facilitator only it should be explained that notes are being taken at the same time. When two facilitators ae available, one facilitator should take the role of note taker and the other leading the discussion and/or asking the questions. These roles should be explained before beginning the activity
- For patients, when introducing the questionnaire indicate that answering questions is not mandatory and answers can be left blank. If the patient wishes to stop or the facilitator feels it is not appropriate to continue please stop
- If a patient requires more support to complete the questionnaire or discloses important information relevant to their care, the facilitator should seek guidance from a pre-identified named contact, ideally a staff member
- If the patient does not want help from the facilitator to complete the questionnaire, they should be allowed to do so. Please ensure that the completed digital or the paper questionnaire is returned to the facilitator
- When facilitating a group discussion do not dwell on questions that may be difficult for some patients to discuss, move on and if necessary adapt group resources to suit local context

Staff climate resources

Organisations working to develop or improve a culture of safety need a reliable measure to monitor the success of their initiatives. Using the Staff Safety Climate Resources, an organisation can gain information about the perceptions of front-line clinical staff about safety in their clinical area and the management's commitment to safety. This provides information about how perceptions vary across different discipline, for example, nursing, medical or Allied Health professionals. As the team tests and implements changes to improve safety culture, you can repeat this questionnaire periodically to assess the impact of the changes.

Digital template and questionnaire

The safety climate in a ward is affected and experienced by everyone who works on that unit. This includes employees from various disciplines who may be frequently assigned to that unit, such as pharmacists, physiotherapists, occupational therapists, social workers, psychologists and dieticians. It also includes doctors of all grades who frequently care for patients on that unit. All individuals who regularly work on the ward should be included in the questionnaire.

NES discussion cards

You can use these cards in any way that helps you and your colleagues to think and talk about safety culture. If you are using the cards in a group, one person may need to act as discussion facilitator. You can use as many or as few cards as you feel are helpful to facilitate the conversation.

Access the NES Discussion cards here

Patient climate resources

The patient climate resources have been developed by people with lived and living experience of mental health care and treatment. The resources are designed to enquire about personal safety, relational, restrictive practice, care and treatment.
Through the use of tests of change and also the analysis of responses to our resources, the layout has been designed in a way that there is a flow to the questions.

Accessible version

An accessible version of the patient safety climate questionnaire has been provided for patients who may have communication and/or cognitive difficulties. The questionnaire has a reduced list of questions, simplified language and graphics used, where appropriate, to illustrate the meaning of the question. The options available to answer each question have also been simplified and include the use of graphics.

Digital template and questionnaire

It is strongly recommended that completion of the patient safety climate questionnaire is supported by an external facilitator. Within the questionnaire there are a number of potentially challenging questions and statements and facilitation will provide support to the individual completing the questionnaire and where appropriate, encourage discussion and record the subsequent narrative. We recognise that this will vary in different areas, but it is essential that the facilitation is carried out by those who are not directly employed or involved as core members of a ward or unit team.

Group resource

This resource allows you have a group discussion with patients on their perceptions of safety. You can use these themes and the questions in any way that helps people to think and talk about safety culture. When working in a group, one person may need to act as facilitator. You can use as many or as few themes and questions as you feel are helpful to facilitate the conversation.

The questions have been categorised into four themes:

- your personal safety
- your relationships with staff
- the use of restrictive practices, and
- your care and treatment

Access the full group safety climate resource here

How to use the data

Safety climate measurement is one way to understand your system through structured engagement with staff and patients. The questionnaire responses and group discussion can provide valuable insight into what is working well and what needs to be improved. Aligning these findings with your local improvement strategy or using these resources in your first step towards service improvement is vital.

Analysis of the responses, both quantitative and qualitative, will allow you to

- understand your system at a specific point in time
- describe the presence or absence of safety
- identify good practice and
- identify areas for improvement

Analysis

The digital resources provide real-time analysis of quantitative questionnaire responses and allow qualitative responses to be easily exported into another analysis package.

A thematic analysis of any qualitative data is advised to identify recurring themes. An excel toolkit is provided with the resource to allow for direct data entry or exporting and thematic analysis.

If the digital resources are not used for remote completion of the questionnaires, batch data entry is still possible after all questionnaire forms for the period have been completed.

Further support

It is recommended that you seek support from your local quality improvement or data analyst team to maximise use of the information.

General data protection regulation (GDPR)

The Safety Climate Resource will gather views and experiences on different aspects of safety in order to make improvement to care. All of the individual resources are intended to be anonymous and non-identifiable. Information on your NHS board GDPR process for collecting, storing and reporting data can be obtained from your information governance GDPR lead.

Addendum

Digital

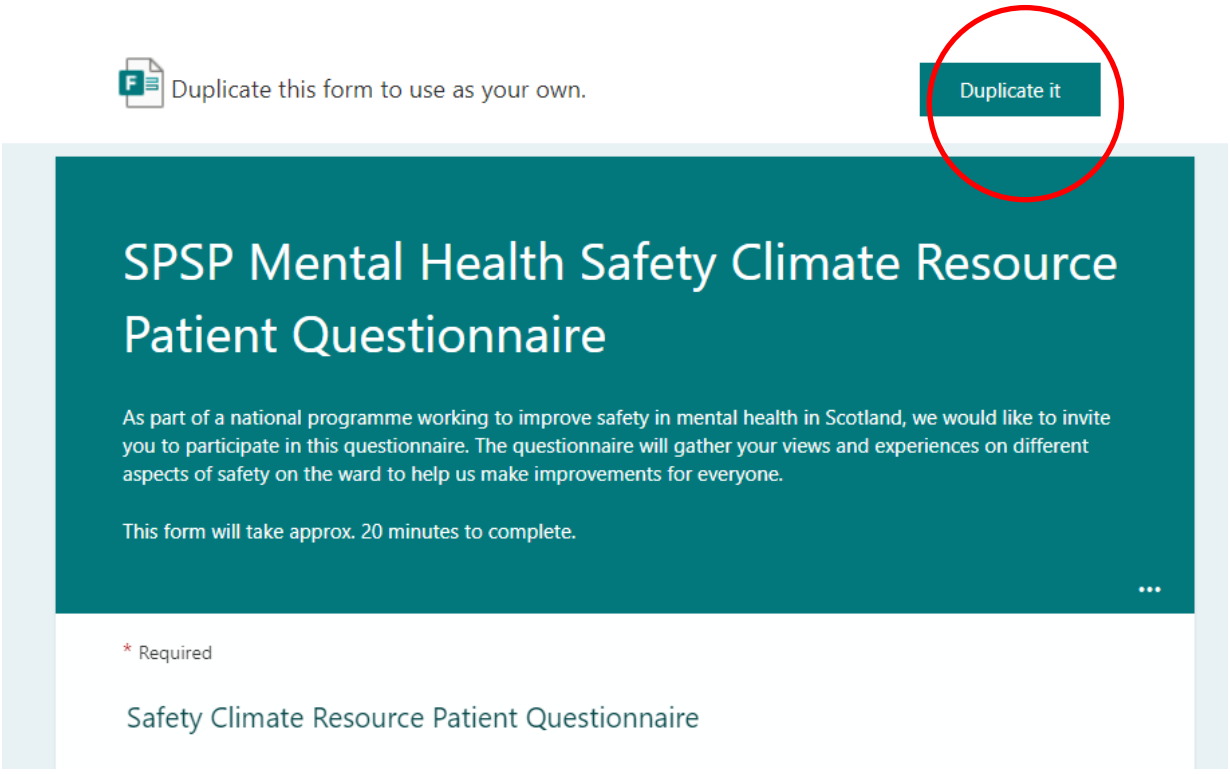
Templates

Access the digital patient safety climate questionnaire here

Access the digital staff safety climate questionnaire here

Step 1. Setting up the digital template for your team.

The template provided needs to be “owned” by your team. The steps below explain how to duplicate/copy the template and change the ownership to one of your teams that will be using the form.

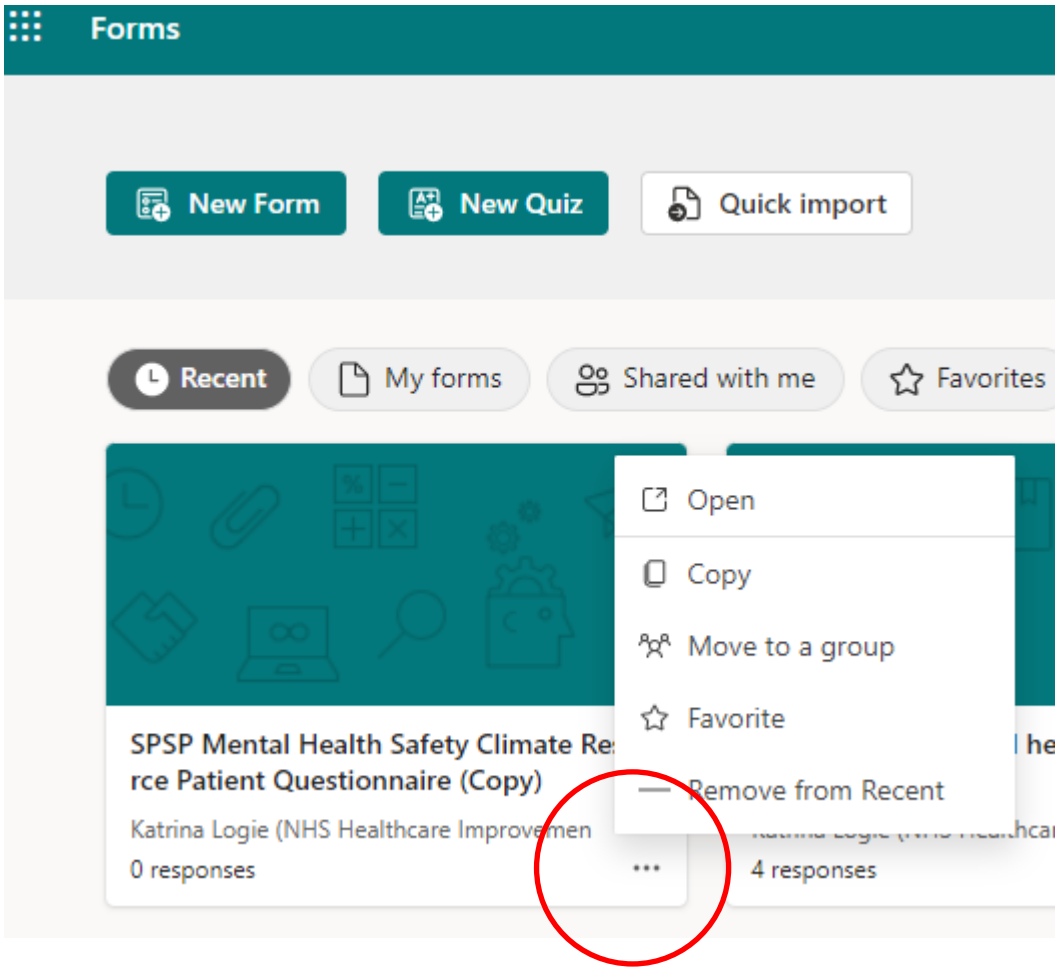


- Click on “Duplicate it” button
- After clicking on "Duplicate it" button your copy of the template tool will open
- Click on “Forms” in top left corner of the screen
- You will see all of your forms
- Hover over the SPSP Mental Health Safety Climate Resource Patient Questionnaire
- In the bottom right corner three dots will appear with “More Options” label

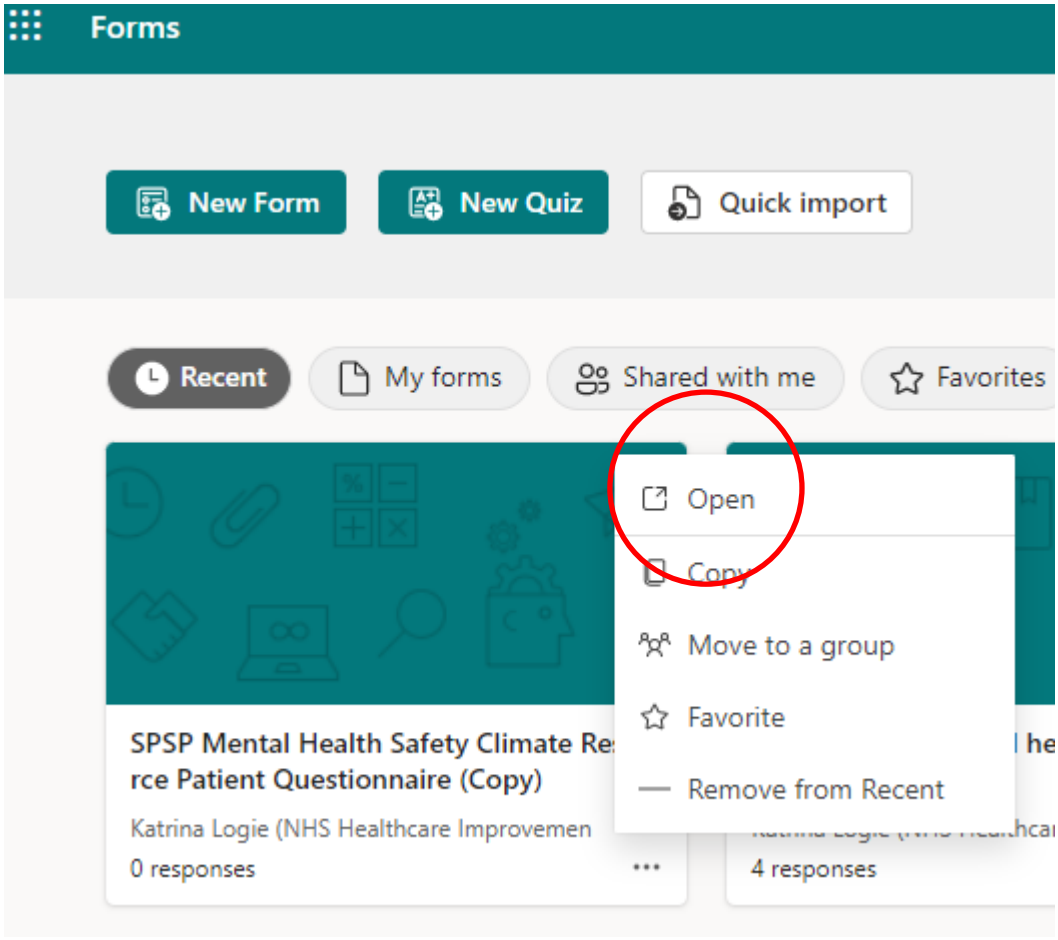
- Click on the three dots and select “Move to a Group”
- From the options choose the appropriate team
- This will be one of your Teams and a team which collects the data and is responsible for the results and the analysis

Step 2. Editing the template

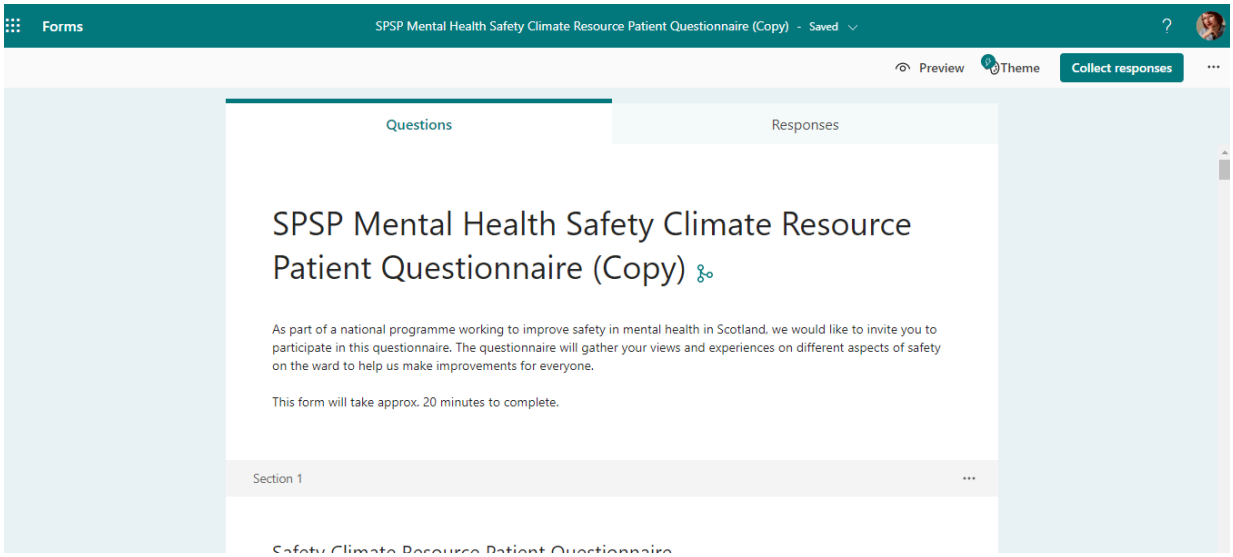
- Once the ownership has been set to the specific team you can edit the template to suit the needs of the team
- Click on the three dots in the bottom right corner of the template



- Click open



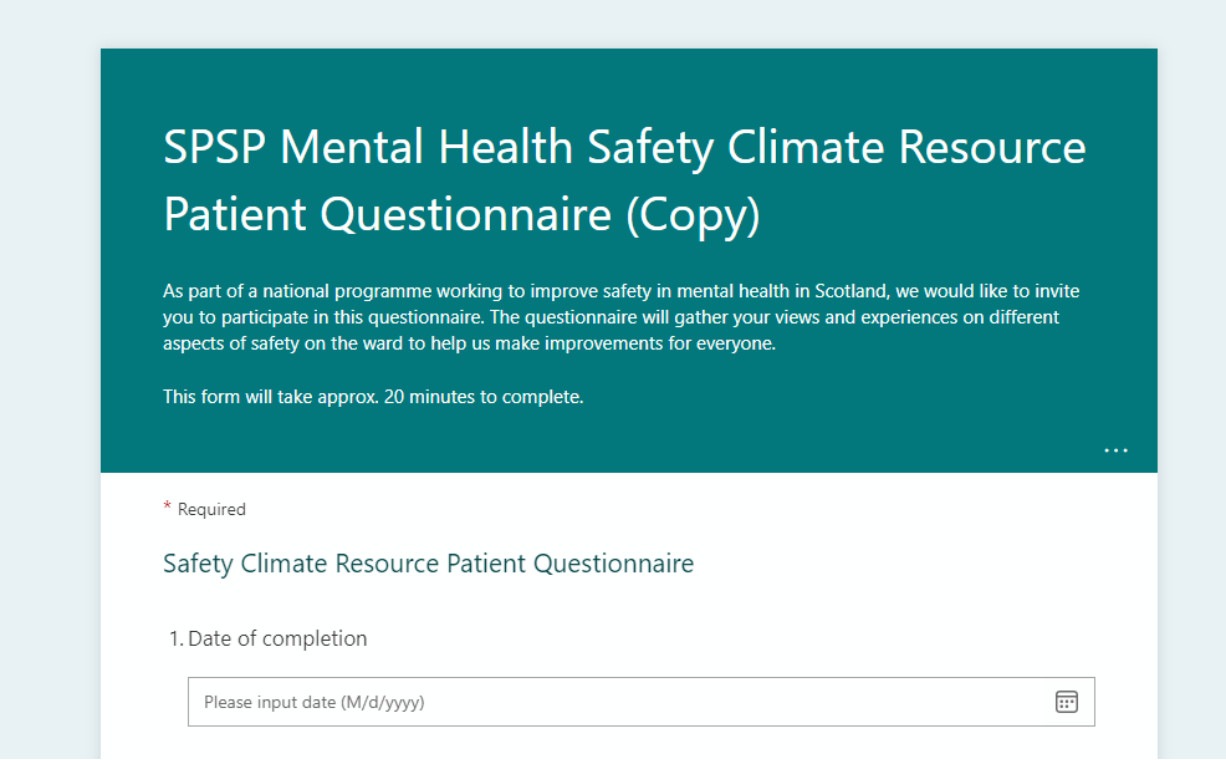
- You are now in the **editing window** of the form



- You can change each question as desired by clicking on it and seeing what changes you wish to make to each question. It is possible to edit the standard questions to fit local context.

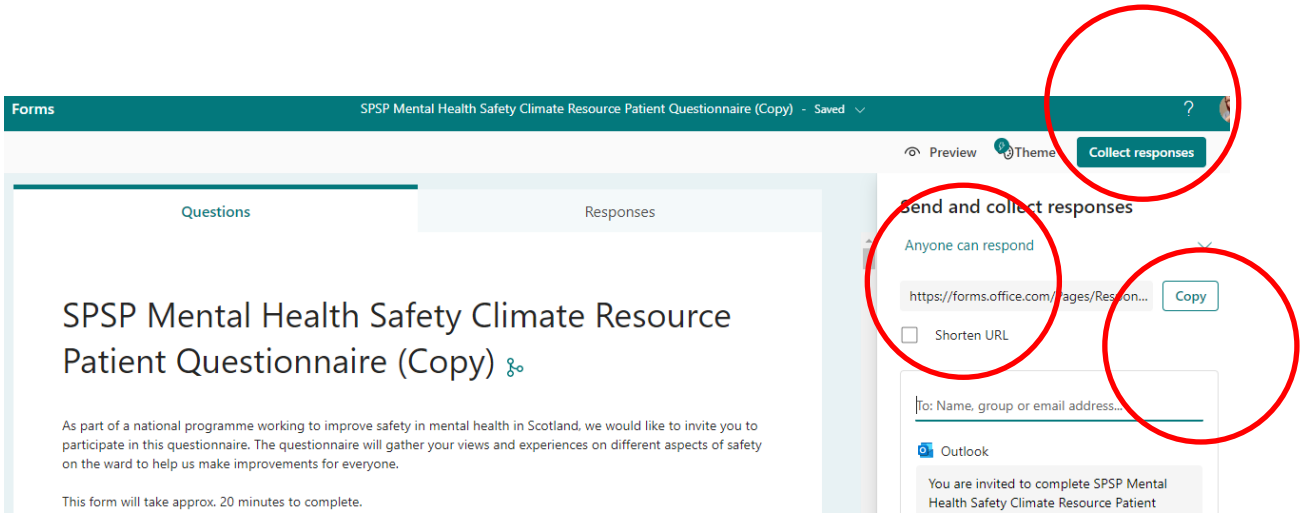
- **This is not yet a live survey. You are still in the working template that allows you to edit your questions but will not collect responses**

Step 3. Collecting responses



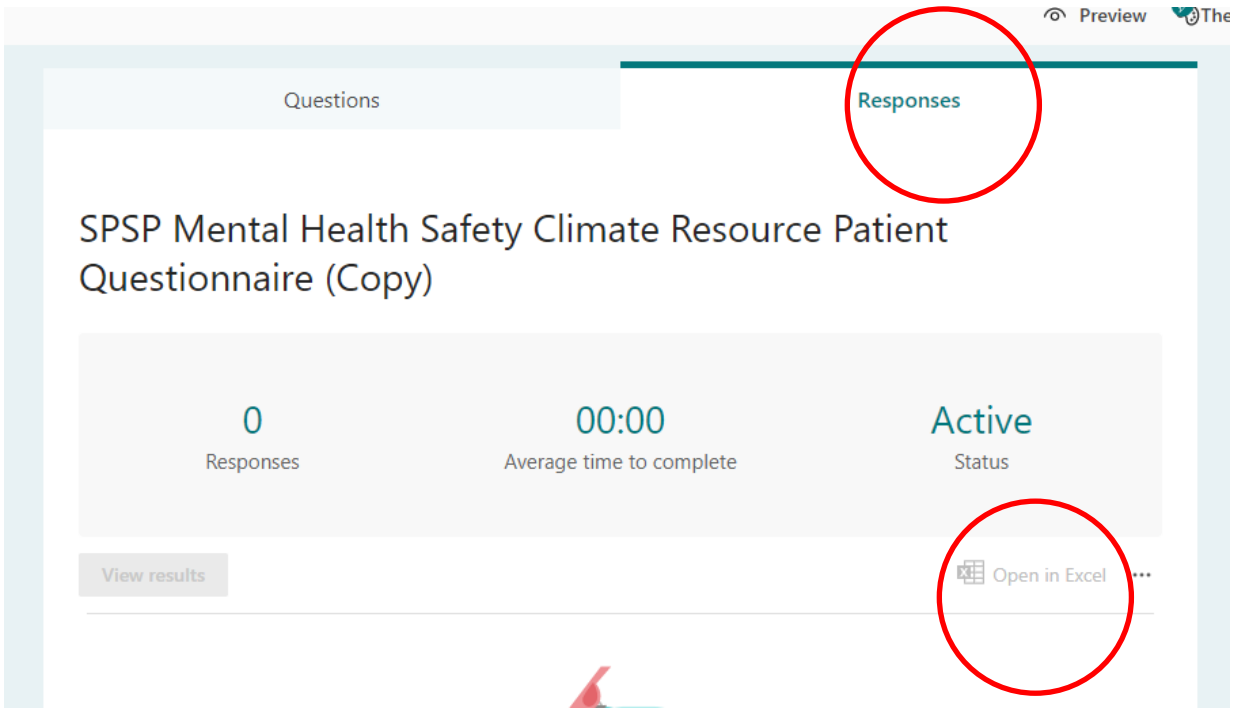
This is how the survey window will look when you copy and paste the URL into the new widow – the survey is now ready to collect your responses.

- Now you are ready to use the template to collect responses
- To do so, click on the “Collect responses” button in the top right hand corner



- You will see a menu open with a heading “Send and collect responses”
- First, make sure that in the top dropdown the option “Anyone can respond” is selected
- Then click on the “Copy” button below the drop down to copy the web address (URL) of the survey
- You can now open a new Tab in your browser (or a new window in your browser) and click paste
- You can also paste this link in an email, word document, message
- **This link is the live survey that collects the responses**

Step 4. Analysing your data



- Once the copied survey link is used and new data entered, it will automatically be collected in the team which owns the survey
- In Microsoft Form on sharepoint (where your template that you duplicated in step 1 is located), find the survey and click on three dots in the bottom and select “Open”
- You will be back at the editing screen described in Step 2 (hyperlink to relevant section)
- This time, click on “Responses” tab at the top of the screen next to “Questions” tab
- You will see your responses, collated, analysed and shown in charts
- From here you can also export to Excel – by clicking on “Open in Excel” button
- You can then analyse the data even further if you prefer.

The data entered into the digital resource provides real-time analysis

Published July 2023
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Healthcare Improvement Scotland
Scottish Patient Safety Programme

Edinburgh Office	Glasgow Office
Gyle Square	Delta House
1 South Gyle Crescent	50 West Nile Street
Edinburgh	Glasgow
EH12 9EB	G1 2NP
0131 623 4300	0141 225 6999

www.healthcareimprovementscotland.org