



# How Are We Doing? A Toolkit for Effective Continuous Quality Improvement Meetings



## INTRODUCTION

The resources in this booklet will help you and your pharmacy staff conduct an effective annual continuous quality improvement (CQI) meeting to assess, summarize, and maintain Safety IQ in your pharmacy. Key elements of Safety IQ include:

- Online reporting of medication incidents and near-miss events to a reporting platform
- A safety self-assessment (SSA) completed within one year of implementing Safety IQ and every three years thereafter
- An annual continuous CQI meeting to discuss medication incidents and near-miss events and build action plans for change
- Quarterly reviews of medication incident and near-miss event data to prompt and support action plans for change
- Staff training on Safety IQ and continuous quality improvement

## HOW TO USE THIS TOOLKIT

Please use the following resources to monitor and improve the quality and efficacy of Safety IQ in your pharmacy through your annual CQI meeting, including assessment of

- Your pharmacy's staff training on Safety IQ
- The quality and volume of incident and near-miss event reporting in your pharmacy
- The status of your pharmacy's SSA
- The progress of existing improvement plans and the development of new improvement plans

The questions, prompts, and checklists you will see throughout this toolkit are meant to spark productive conversation, reflection, and analysis of your pharmacy team's engagement with the Safety IQ program.

You can also use this resource to properly document and summarize your pharmacy team's engagement with Safety IQ. Each medication incident reporting platform offers its own capabilities which may or may not include a function to record your CQI meeting, resulting actions plans, or improvements. These documents can also serve as a benchmark to monitor your team's efforts and assess the effectiveness of improvements.

**It is through reflection, open discussion, monitoring, and measurement, that your team will see the value added by full engagement with Safety IQ: safer practices that reduce the chance of patient harm.**

## CONTINUOUS QUALITY IMPROVEMENT MEETINGS

All community pharmacies must hold an annual continuous quality improvement (CQI) meeting with most staff in attendance to discuss medication incidents and ways to improve the use of Safety IQ. Your annual CQI meeting should include the following:

- Discussion about medication incidents and near-miss events
- Discussion about the progress of existing improvement plans or brainstorming to create improvement plans based on medication incidents and near-miss events
- Review of your SSA results and status of related improvement plans
- Review of the pharmacy's incident data summary for trends and discussion of potential issues
- Share learning and staff education on medication safety from other sources such as the College or ISMP Canada
- Assessing the quality of your Safety IQ program and planning changes to enhance use/engagement
- Progress of improvement plan from last CQI meeting

### TOP TIPS FOR CONDUCTING AN EFFECTIVE CQI MEETING

CQI meetings are only required once per year, so it is important to make the most of your time. Consider the following tips as you prepare for your annual CQI meeting:

- Set a written agenda and distribute to staff in advance of the CQI meeting to ensure staff are prepared for discussion. This can also be used to encourage staff who cannot make it to the meeting to provide their thoughts and feedback. See [Appendix A](#) for a sample CQI Meeting Agenda.
- Use the resources in this guide or another format to document who attended, what was discussed, and the outcomes and action plans from the meeting. Your reporting platform may or may not provide a space to record your CQI meetings.
- Conduct the required quarterly reviews of your incident and near-miss event data. Quarterly reviews will support your ongoing understanding of what is happening in your pharmacy so you will be prepared for your CQI meeting and any other discussions of incidents and near-miss events and improvement plans.
- Encourage the participation of each staff member. Call on more quiet staff members to contribute.
- Ensure you support psychological safety. This means that every person's input is celebrated and valued, and each team member can bring forward their questions or concerns without being made to feel they are disruptive, negative, or unintelligent.
- Take an appropriate amount of time to conduct the meeting. Don't rush and schedule the meeting outside of pharmacy operating hours if possible.
- Celebrate the good catches (near-miss events) and contributions of your staff to CQI. Was an incident within the last year managed particularly well? Discuss and celebrate your team's CQI wins.
- Discuss resources and supports for staff post-incident to remind staff what is available and to support psychological safety.
- Prepare your presentation of key medication incidents and near-miss events and the progress of improvement plans since last meeting or discussion well in advance of the meeting. A PowerPoint presentation or other visual format can increase meeting engagement.
- Decide on an analysis method for your team if you are improving or building an improvement plan. The [Guide to Safety IQ](#) lists several methods and resources.
- Leverage existing resources as needed. See the CPhM [Shared Learning](#) and [Safety IQ](#) pages, your reporting platform's resources, [CQI Meeting FAQ](#), and ISMP Canada for ideas or supporting materials.

## CQI MEETING SUMMARY: SAFETY IQ TRAINING ASSESSMENT

According to the [Medication Incident and Near-Miss Event Practice Direction](#), “licensed pharmacists, pharmacy technicians, pharmacy assistants and employees of the pharmacy must be trained and are required to comply with systems, policies, and procedures related to medication incidents and near-miss events.” All community pharmacies should have a **documented training plan** included in their policies and procedures manual outlining how all pharmacy staff will receive initial and ongoing training on Safety IQ.

You can use the following checklist and prompts to build and/or assess your pharmacy’s training plan for Safety IQ.

YES	NO	TRAINING PROGRAM ITEM
<input type="checkbox"/>	<input type="checkbox"/>	Pharmacy manager considers whether to appoint a staff member as a Continuous Quality Improvement (CQI) coordinator in addition to themselves to help ensure training is ongoing and complete and staff report incidents and near-miss events in a timely manner.
<input type="checkbox"/>	<input type="checkbox"/>	Pharmacy manager and CQI Coordinator (if appointed) review and understand College resource documents about the Safety IQ program: <ul style="list-style-type: none"> <li>• <a href="#">Medication Incident and Near-Miss Event Practice Direction</a></li> <li>• <a href="#">Guide to Safety IQ</a></li> <li>• <a href="#">Community Pharmacy Safety Culture Toolkit</a></li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	The pharmacy has a documented training plan included in their policies and procedures manual.
<p>If no, we will develop and implement a training plan by:</p> <p>Who is responsible for developing and implementing the training plan:</p>		
<input type="checkbox"/>	<input type="checkbox"/>	Pharmacy staff members, including pharmacists, pharmacy technicians, and pharmacy assistants, review and understand College resource documents on the Safety IQ program: <ul style="list-style-type: none"> <li>• <a href="#">Safety IQ FAQ</a></li> <li>• <a href="#">Medication Incident and Near-Miss Event Practice Direction</a></li> <li>• <a href="#">Introduction to Safety IQ Training Video</a></li> <li>• <a href="#">Quick Guide to Reporting</a></li> <li>• <a href="#">Quick Guide to Documenting</a></li> <li>• <a href="#">Quick Guide to Responding to an Incident</a></li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	Pharmacy staff including pharmacists, pharmacy technicians, and pharmacy assistants review and understand the pharmacies policies and procedures for Safety IQ including <ul style="list-style-type: none"> <li>• Discovery and disclosure of medication incidents</li> <li>• Reporting medication incidents and near-miss events</li> <li>• Investigation and analysis of medication incidents and near-miss events</li> <li>• Safety self-assessment</li> <li>• Continuous quality improvement meetings</li> </ul>

YES	NO	TRAINING PROGRAM ITEM
<input type="checkbox"/>	<input type="checkbox"/>	All pharmacy staff have completed the training provided by the medication incident reporting platform.
<input type="checkbox"/>	<input type="checkbox"/>	Pharmacy manager engages staff in discussion on processes and encourages staff to report incidents and near-miss events.

**STAFF TRAINING IMPROVEMENT SUMMARY**

**Items to be added to documented training plan:**

**Who is responsible for the documented training plan:**

**Staff that require additional Safety IQ training are:**

**We will complete additional training by (date):**



## CQI MEETING SUMMARY: REVIEW AND DISCUSSION OF MEDICATION INCIDENTS AND NEAR-MISS EVENTS

**Key changes discussed by the pharmacy team based on a review of in-pharmacy medication incidents and near-miss events:**

**Key changes discussed by staff based on a review of medication incidents and near-miss events occurring elsewhere (within Manitoba or throughout Canada):**

**Status of improvement plan from last CQI meeting:**

**Summary of current or updated improvement plan based on medication incident and near-miss event discussions:**

## CQI MEETING SUMMARY: SAFETY SELF-ASSESSMENT

All pharmacies must complete a safety self-assessment (SSA) within one year of implementing Safety IQ or within one year of opening in the case of a new pharmacy. An SSA must be completed every three years thereafter. Once complete, the pharmacy must create, implement, and monitor an improvement plan based on the findings of the SSA. Some reporting platforms and standalone SSA products will have the capability to record and track improvement plans, but it is the pharmacy manager's responsibility to ensure that improvement plans are monitored and updated.

<b>Date of Last SSA:</b>		
<b>Staff members involved in completing the last SSA (check all that apply):</b>		
<input type="checkbox"/> Pharmacy Owner	<input type="checkbox"/> Pharmacy Manager	<input type="checkbox"/> Staff Pharmacist
<input type="checkbox"/> Relief Pharmacist	<input type="checkbox"/> Pharmacy Technician	<input type="checkbox"/> Pharmacy Assistant
<input type="checkbox"/> Pharmacy Student	<input type="checkbox"/> Other:	

**Was an analysis of the SSA results completed:**  Yes  No

If yes, when:

If no, when will an analysis be completed:

**Was the date of SSA completion and product used documented in the Pharmacy Portal on the CPhM website (required):**

Yes  No

**Key areas for improvement identified from the last SSA:**

**Status of initiatives/activities to improve the areas identified from the last SSA:**

# APPENDIX A: SAMPLE CQI MEETING AGENDA

**Meeting Date:**

## 1. ATTENDANCE

## 2. ONGOING BUSINESS

- a. Quick review of medication incident statistics from last CQI meeting or last discussion/safety huddle
- b. Review of action plans and discuss progress made since the last CQI meeting. Are the action plans working well or do they need to be adjusted?

## 3. NEW BUSINESS

- c. Celebrate CQI success
- d. Review/assess Safety IQ training (see Safety IQ Training Assessment)
- e. Review/assess the quality and frequency of medication incidents and near-miss events (see Medication Incident and Near-miss Event Reporting Summary)
- f. Presentation of key medication incidents and near-miss events or pharmacy trends
- g. Discussion and analysis of medication incidents and near-miss events or trends
- h. Summarize key issues
- i. Identify solutions
- j. Create an action plan
- k. Review/assess SSA status and resulting improvement plans
- l. Staff education (discuss CQI education resources and training available)