

# Patient Safety



Perspectives on Evidence,  
Information and Knowledge Transfer



EDITED BY

LORRI ZIPPERER

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# Patient Safety

*For Ellen*

# About the Editor

Lorri Zipperer, Cybrarian, is the principal at Zipperer Project Management, in Albuquerque, New Mexico. Lorri has been in the information and knowledge management field for over two decades, over half of which have been focused on patient safety. She was a founding staff member of the National Patient Safety Foundation as the information project manager. Lorri currently works with clients to provide patient safety information, knowledge-sharing, project management and strategic development guidance. Lorri has recently led projects in patient safety educational tool development, publication evidence identification and organizational knowledge access improvement. She currently serves as the Cybrarian for the Agency for Healthcare Research and Quality's Patient Safety Network collaborating with the multidisciplinary editorial and production team since the launch of the site in 2005. She was recognized that same year with a 2005 Institute for Safe Medication Practices Cheers Award for her work with librarians, libraries and their involvement in patient safety. She has initiated and published two national surveys of librarians on their role in patient safety work to map the evolution of that role over time. Ms Zipperer's expertise was highlighted in the June 2009 Medical Library Association policy on the role of librarians in patient safety. She has launched blogs, online groups and communities of practice to support sharing of information and knowledge to facilitate safety and quality improvement among her peers.

Ms. Zipperer was a 2004–2005 Patient Safety Leadership Fellow where she explored how information and knowledge transfer behaviours affect a learning culture. She has participated in research to explore the process of knowledge-sharing both at the bedside and with clinical teams. In 2007 and 2009, she was funded by regional offices of the National Network of Libraries of Medicine to work with her colleagues in acute care environments to facilitate avenues for implementation of knowledge-sharing initiatives. More recently Lorri has participated in a series of workshops looking at systematic and cognitive impacts that evidence, information and knowledge can have on

decision-making in diagnostic error. She has designed and co-facilitates an interprofessional workshop on knowledge-sharing in hospitals which has been noted by attendees as being “transformational”.

Lorri earned her Masters of Arts in library and information studies from Northern Illinois University. She has served as an adjunct professor for library management at the university level. Lorri has received honours from the library and information science community and has been published on topics such as alternative roles for librarians, patient safety, collaboration, systems thinking and knowledge management.



# About the Contributors

**Elaine Alligood, MLS** Elaine is the Chief, Library Service for the Boston Veterans Affairs (VA) Healthcare System's three campuses. A member of the New England VA Library Re-design Task Force, she helped develop a consolidated network-wide 24/7 virtual knowledge library accessible across VA New England. She provides client-focused service for clinicians and researchers. She's a member of several research teams, care coordination, mental health, and service line management. Working directly with clinicians and researchers at the frontlines she attends rounds and morning reports. She partners with clinical staff to integrate e-resources into teaching and research. One of the co-developers of the Medical Library Association (MLA) continuing education program entitled "Diagnostic Error and the Librarian's Role in Patient Safety," Elaine believes librarian's transforming roles perfectly align us with the clinical and research staff's ever-changing information needs. Moving librarians out of the library "place" to where information needs occur – at the point-of-care where research benefits everyone: clinicians, researchers and patients.

**James P. Bagian, MD, PE** Jim is the Director of the Center for Healthcare Engineering and Patient Safety, the Chief Patient Safety and Systems Innovation Officer, as well as a Professor in the Department of Anesthesiology and College of Engineering at the University of Michigan. Dr. Bagian is a member of the National Aeronautics and Space Administration (NASA) Aerospace Safety Advisory Panel and was a NASA astronaut and veteran of two space shuttle flights. He serves as a member of the Board of Governors of the National Patient Safety Foundation, was the founding Director of the National Center for Patient Safety and the first Chief Patient Safety Officer at the US Department of Veterans Affairs. Dr. Bagian was elected as a member of the National Academy of Engineering and the Institute of Medicine in 2000 and 2003, respectively.

**Jeff Brown, MeD** Jeff is a senior member of the Cognitive Systems Engineering Group and Cognitive Solutions Division of Applied Research



Associates (ARA), based in Fairborn, Ohio. He holds a faculty appointment with Parks College of Engineering, Aviation, and Technology at St. Louis University. His work is focused on supporting improvement in the management of risk and safety in domains where there is high consequence for failure. Although he has worked in a variety of high-risk domains, he is especially interested in supporting improvement in the safety of patient care. He has engaged in numerous patient safety improvement efforts in US hospitals since 1999 and, in 2002, joined a cardiac surgery care team from Concord, NH in receiving a John M. Eisenberg Patient Safety Award for System Innovation from the Joint Commission and National Quality Forum. Jeff has authored and co-authored articles, books, book chapters, and technical reports on patient safety and system safety topics. He is a co-author of *Safety Culture: Building and Sustaining Safety Culture in Aviation and Healthcare* (Ashgate, 2012), *Safety Ethics: Cases From Aviation, Healthcare, and Occupational and Environmental Health* (Ashgate, 2005), and a contributing author to *Improving Healthcare Team Communication: Lessons From Aviation and Aerospace* (Ashgate, 2008). Prior to 1996, Jeff served as a faculty member and department chair in collegiate aviation programs. He earned his Master's and Bachelor's degrees from the University of Maine.

**Susan Carr** Susan is editor of *Patient Safety & Quality Healthcare*,<sup>1</sup> a bi-monthly publication and website she developed with Lionheart Publishing in 2004. Susan also works as a freelance editor and writer for organizations including the Society to Improve Diagnosis in Medicine (SIDM), Institute for Healthcare Improvement (IHI), Medically Induced Trauma Support Services (MITSS), the Association of Educators in Imaging and Radiological Sciences, and the Scleroderma Foundation. Susan's interests include the use of social media to improve patient safety and efforts to engage patients as active partners in care. She is a member of the Society for Participatory Medicine, the American Society of Professionals in Patient Safety, and the Association of Health Care Journalists. Susan lives and works in Concord, MA.

**Melissa Cole, BSN, MSW, FACHE** Melissa is a Quality Consultant at the University of New Mexico Hospitals. As a healthcare leader for over 25 years, Melissa builds bridges to leverage low- and high-tech solutions to create high performing, quality care environments. Ms. Cole was named as one of the "12 Powerful Voices in Healthcare Innovation" by *Medcity News* in October 2012 and is listed in *Healthcare IT News'* top 100 to follow on Twitter for health information technology information. Ms. Cole is a contributor to Frankie Perry's

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1 See [www.psqh.com](http://www.psqh.com)



second edition, *The Tracks We Leave: Ethics in Healthcare Management Dilemmas in Healthcare* (Health Administration Press, 2013). Ms. Cole currently serves as a Past-President of New Mexico Healthcare Executives and is an active member of Health Information Management Systems Society (HIMSS). Melissa holds a master of social work degree from The University of Michigan and earned her bachelor's degree in nursing at Hope College, Hope-Calvin Department of Nursing.

**Catherine K. Craven, PhD MLS, MA** Catherine is a doctoral candidate in health informatics at University of Missouri, where she is a REDCap developer and system administrator for the School of Medicine, and has been a National Library of Medicine Biomedical and Health Informatics Research Fellow. Her research interests involve human and socio-technical factors. She has most recently published on planning and preparation processes for electronic health record (EHR) system implementation in critical access hospitals and a task analysis of intensive care unit (ICU) physicians examining technology, interruptions and clinical team communication. Catherine was a clinical informationist at Welch Medical Library, Johns Hopkins Medical Institutions, from 2007–2010, where she helped develop the embedded informationist service model in practice there. She was a core course-development team member for a new course, “Transitions to the Wards,” in the new “Genes to Society” medical curriculum, participated on research teams leading to co-authored publications, managed a clinical research informatics project for the School of Medicine's Vice Dean of Clinical Research, and earned a graduate certificate in the business of medicine at the Carey Business School, Johns Hopkins University. Catherine has been an active member of the American Medical Informatics Association (AMIA) for 10 years, serving in leadership roles including on the AMIA Board (2008–2009), as Chair, Membership Committee (2008–2011), and the 2013–2014 Chair, Evaluation Working Group.

**Prudence W. Dalrymple, PhD, MS, AHIP** Prudence is the Director of the Institute for Healthcare Informatics at Drexel University, an interdisciplinary center devoted to the intersection of people, information and technology in the service of health communication and information. In addition to her earlier work in cognitive models of information system design, she has more than 20 years of experience in the field of health information and health communications, and holds a master's degree in health informatics from Johns Hopkins University School of Medicine and a certificate in health communications from its Bloomberg School of Public Health. She uses both qualitative and quantitative methods to examine how both patients and professionals seek and



apply evidence, information and knowledge, and how information seeking and health literacy affect patient engagement and health outcomes. The author of over 50 articles and book chapters, Prudence has held leadership positions in professional associations and is the recipient of numerous academic honors.

**Amy E. Donahue, MLIS, AHIP** Amy is the User Education and Reference Librarian at the Medical College of Wisconsin where she provides library and information services education to students, faculty and staff. Prior to this role, she worked at the Aurora Medical Center in Grafton, Wisconsin as the new hospital's first librarian and provided information services to the hospital's clinical staff as well as patients in support of patient-centered care and evidence-based practice. She received her master's degree in library and information from the University of Washington's iSchool in 2007, and was accepted into the National Library of Medicine's prestigious Associate Fellowship Program from 2008–2010. She is a member of the Academy of Health Information Professionals (AHIP) and is active in the Medical Library Association and the Special Libraries Association.

**Julia M. Esparza, MLS, AHIP** Julie is an Associate Professor of the Department of Medical Library Science and Clinical Medical Librarian working at Louisiana State University Health Sciences Center in Shreveport, LA. Ms. Esparza is on the Institutional Review Board of the health sciences center. She has over 16 years of experience in the healthcare field. As a hospital librarian she was trained as a Six Sigma Green Belt and has worked on Failure Modes and Effects Analyses teams. She specifically teaches a course called "Searching for Quality" with the emphasis on searching for quality improvement information. Ms. Esparza is a Distinguished Member of the Academy of Health Information Professionals (AHIP) and currently serves on the Board of Directors for the Medical Library Association. She graduated from Indiana University with a Master of Library Science.

**Margo S. Farber, BS, PharmD** Margo is currently the Director, Drug Information Service at the University of Michigan Health System. In this role, Farber oversees drug use policy and formulary management for the University of Michigan Health System as well as drug information experiential training for pharmacy students and residents. Prior to this appointment, Farber served as the Director, Drug Information/Drug Use Policy at the Detroit Medical Center (DMC). Primary responsibilities included overseeing the development, standardization and maintenance of drug use guidelines, formulary and medication safety initiatives at the DMC, an eight-hospital health system.



Integrating medication safety principles into the electronic health record became a primary focus while at the DMC position. Farber maintains didactic teaching responsibilities at the Wayne State University School of Medicine in the areas of medication safety and psychotherapeutics. Margo Farber received her Bachelor of Science and PharmD degrees from the University of Michigan and completed a residency in pharmacy practice at the National Institutes of Health, Bethesda, MD.

**Howard Fuller, MLS** Howard is currently the Director of Library Services for the Heald College Library & Learning Resource System. His primary function is to provide 12 on-ground and one online campuses with strategic guidance and initiate and lead projects that support their fiscal, operational, and academic operations. Howard holds a master's degree in Library and Information Science and a baccalaureate in health education/cardiac rehabilitation from the University of Wisconsin in Milwaukee. Howard was a National Library of Medicine fellow in Medical Informatics; completed a post-graduate program in Leadership at Stanford University; is a certified project manager; and accredited Cognitive Edge practitioner in complex adaptive systems. He's published in professional and peer-reviewed journals.

**Mark L. Graber, MD, FACP** Mark is a Senior Fellow at RTI International and Professor Emeritus of Medicine at the State University of New York at Stony Brook. Dr. Graber has an extensive background in biomedical and health services research and has authored over 70 peer-reviewed publications. He is a national leader in the field of patient safety and originated Patient Safety Awareness Week in 2002, an event now recognized internationally. Dr. Graber has also been a pioneer in efforts to address diagnostic errors in medicine, and his research in this area has been supported by the National Patient Safety Foundation and the Agency for Healthcare Research and Quality. In 2008 he convened and chaired the Diagnostic Error in Medicine conference series, and in 2011 he founded the Society to Improve Diagnosis in Medicine (SIDM). Dr. Graber has participated in several different events targeted at medical librarians with the goal of applying their expertise to the improvement of the diagnostic process at their local sites.

**Suzanne Graham, RN, PhD** Suzanne is Executive Director of Patient Safety and Patient and Family-Centered Care for Kaiser Permanente California Regions. She has served in multiple roles within Kaiser Permanente at the medical center, regional and national levels. Her educational background includes a Bachelor of Science in nursing as well as master's degrees in school



health and developmental disabilities and a doctoral degree in allied health administration and education. Suzanne is a graduate of the University of North Carolina Kenan-Flagler Business School Kaiser Permanente Advanced Leadership Program and the AHA Health Forum Patient Safety Leadership Fellowship Program, and completed the IHI Patient Safety Officer Executive training program. Suzanne is a member of several national patient safety groups including the Joint Commission Patient Safety Advisory Group. In 2006 Suzanne received the first National Patient Safety Foundation Chairman's Medal in recognition of leadership in patient safety.

**Barbara Jones, MLS** Barbara is a health sciences librarian with the National Network of Libraries of Medicine, MidContinental Region. She is the Missouri Coordinator and represents the six-state MidContinental Region as Library Advocacy Project Coordinator. Her work experience includes clinical librarianship in both hospital and clinic settings as well as program development, teaching and training in academic hospital and public library settings. She actively writes, presents and encourages the expanded involvement of librarians in patient safety and knowledge management work. Barbara designs methods for teaching business practices to librarians and develops tools to advocate the value of librarian engagement in the work of healthcare. In addition, Barbara is a co-developer of the Library Valuation Calculators that have application in a variety of library settings. She provides instruction for librarians on business practices in the library. Barbara has a master's degree in library science from the University of Arizona. She is based at, and serves on the staff at the J. Otto Lottes Health Science Library at the University of Missouri.

**Gunjan Kahlon, MD** Gunjan, a board certified internist, is Assistant Professor of the Department of Medicine and serves as the Section Chief of Internal Medicine at Louisiana State University Health Sciences Center in Shreveport, LA. She currently is course director for Foundations of Clinical Medicine which is for first-year and second-year students. Dr. Kahlon serves as director of the Internal Medicine Board Review. She has written on teaching evidence-based medicine to medical students. Gunjan graduated from Government Medical College and Rajindra Hospital in Patiala, Punjab, India and her residency at St. Luke's Hospital in Bethlehem, Pennsylvania.

**Linda Kenney** Linda is the Executive Director and President of MITSS (Medically Induced Trauma Support Services, Inc.). She founded the organization in 2002 as the result of a personal experience with an adverse medical event, when she identified the need for support services in cases of



adverse events and outlined an agenda for change. Since that time, she has been a tireless activist for patient, family, and clinician rights. She has become a nationally and internationally recognized leader in the patient safety movement and speaks regularly at healthcare conferences and forums. In 2006, Linda was the first consumer graduate of the HRET/AHA Patient Safety Leadership Fellowship. That same year, she was the recipient of the National Patient Safety Foundation's esteemed Socius Award, an annual award given in recognition of effective partnering in pursuit of patient safety. She has authored and contributed to a number of publications on topics including the emotional impact of adverse events on patients, families, and clinicians. Linda serves on the boards of the Massachusetts Coalition for the Prevention of Medical Errors, National Patient Safety Foundation and Planetree.

**Ross Koppel, PhD, FACMI** Ross is a leading scholar of healthcare IT and of the interactions of people, computers and workplaces. His articles in the *Journal of the American Medical Association (JAMA)*, *Journal of the American Medical Informatics Association (JAMIA)*, *New England Journal of Medicine (NEJM)*, *Health Affairs*, etc are considered seminal works in the field. Professor Koppel is on the faculty of the Sociology Department, University of Pennsylvania (UPenn) and on the faculty of the Medical School at UPenn, where he is the Principal Investigator of the "Study of Hospital Workplace Culture and Medication Error." Koppel is also a Senior Fellow of the Leonard Davis Institute at Penn's Wharton School. In addition, Dr. Koppel is also the Internal Evaluator of Harvard Medical School's project to create a new HIT architecture, and is a co-investigator of the National Science Foundation Project on Safe Cyber Communication and Smart Alerts in Hospitals. At the American Medical Informatics Association, he is past chair of the Evaluation Working Group and a member of the Usability Task Force. Professor Koppel focuses on the use of computer system *in situ*. His work combines ethnographic research, extensive statistical analysis, surveys, and usability studies. Recently he co-authored the Agency for Healthcare Research and Quality (AHRQ) online resource *Guide to Reducing Unintended Consequences of Electronic Health Records*.<sup>2</sup> His newest book, *First Do Less Harm: Confronting the Inconvenient Problems of Patient Safety* (Cornell University Press) was published in May of 2012.

**Kathryn K. Leonhardt, MD, MPH** Kathy is the Vice President, Patient Experience and Patient Safety at Aurora Health Care in Wisconsin. In this role, she leads patient safety and patient experience throughout Aurora, a large integrated health system including 15 hospitals, 150 clinics and over 80 retail

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<sup>2</sup> See <http://www.healthit.gov/unintended-consequences/>



pharmacies. Dr. Leonhardt has worked in a variety of healthcare settings, including the public and private sector. She has held clinical, administrative and research positions in California, Guam and Wisconsin. Her research, publications and national presentations have included epidemiologic investigations, Phase III clinical trials, quality improvement, patient safety and patient experience. Research topics have included patient-and family-centered care, women's health, medication safety, and infection prevention in both ambulatory and hospital settings. She was the Principal Investigator and author of an AHRQ-funded guide on patient advisory councils. Her patient safety projects have been recognized nationally, including the Institute for Safe Medication Practices Cheers Award in 2004 and 2007. Dr. Leonhardt is a preventive medicine/public health physician, with a Bachelor of Arts from Williams College, an Doctor of Medicine from the University of Michigan and an Master of Public Health in Epidemiology from the University of California-Berkeley.

**Della M. Lin, MD** Dr. Lin is a Senior Fellow with the Estes Park Institute<sup>3</sup> with a passion for patient safety and collaborative systems thinking. She was an inaugural National Patient Safety Foundation/Health Forum Patient Safety Leadership Fellow<sup>4</sup> (2002) and continues as core faculty for the program, now in its twelfth year. Dr. Lin is adjunct faculty with the Institute for Healthcare Improvement (IHI), and faculty with the Jefferson School of Population Health Quality Safety Leadership Series (QSLs). She is a frequent speaker and author on issues relating to physician, executive leadership and board engagement around quality; patient safety and patient-centered care; organizational and safety culture; surgical and anesthesia safety; and multidisciplinary team simulation/near miss debriefing. Dr. Lin is currently the Hawaii Physician Lead for the Surgical Unit Safety Program (SUSP), dedicated to improving patient safety and surgical site infections in the perioperative environment. Dr. Lin continues an active practice in anesthesiology, has several committee appointments with the American Society of Anesthesiology, and has been a board examiner for the American Board of Anesthesiology.

**Judith Napier, BSN, MSN, RN** Judith is the Vice President for Risk Services for Allina Health in Minnesota. Before joining Allina Health, Napier was a Senior Director for Patient Safety and Risk Management for Children's Hospitals and Clinics of Minnesota. Napier has held past positions of Senior Vice President for MMI Companies, an international healthcare risk

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3 See [www.estespark.org](http://www.estespark.org)

4 This program has changed its name over time. It is now called: AHA-NPSF Comprehensive Patient Safety Leadership Fellowship. See [http://www.hpoe.org/PSLF/PSLF\\_main.shtml](http://www.hpoe.org/PSLF/PSLF_main.shtml)



management company where she was a Senior Consultant and Healthcare leader working with domestic and international hospitals and healthcare systems on risk management tools and patient safety techniques for clinical and administrative performance improvements. Before her work with MMI Companies, Napier held positions in perinatal clinical care and academics where she led the maternal child nursing curriculum for the associate nursing degree program in a community college setting. Napier is a Registered Nurse with a Bachelor of Science in Nursing from Niagara University in New York State, and a Masters in Nursing from California State University at Los Angeles. She has a certificate of completion from HRET and the Health Forum Patient Safety Leadership Fellowship 2004–2005 and completion of the Institute for Healthcare Improvement's (IHI's) Patient Safety Executive Development Program. Judith has been a national and international speaker in the areas of patient safety, quality and risk management.

**Barbara L. Olson, MS, RN, FISMP** Barbara is Senior Patient Safety Officer at LifePoint Hospitals, Inc., serving 57 non-urban hospitals in 20 states. She received her BSN from Emory University, Atlanta, GA, and completed a master's degree in Nursing Leadership in Healthcare Systems at Regis University in Denver, CO. Barbara completed a one year post-graduate Safe Medication Management fellowship with the Institute for Safe Medication Practices. She serves on the Executive Board of the American Society of Medication Safety Officers. Barbara is a Certified Professional in Patient Safety and a Fellow of the American Society of Medication Safety Officers. In 2009, Barbara received ISMP's Cheers Award for her contributions to medication safety using emergent social media platforms. You can find her on Twitter (@safetynurse) and on the Medscape platform where she hosts a blog, "On Your Meds: Straight Talk about Medication Safety."

**Grena Porto, BSN, MS** Grena is a nationally recognized expert, leader and author in patient safety, risk management and quality improvement. She is a consultant specializing in providing customized consulting support to healthcare organizations with a focus on implementation of patient and worker safety practices and programs, clinical teamwork, culture of safety implementation and sustainment, disclosure of error to patients and families, critical incident response and other areas of clinical risk management and patient safety. In the past, Ms. Porto served as Client Executive and Sr. Vice President with Marsh USA, Inc., as Senior Director of Clinical Consulting and Director of Clinical Risk Management at VHA, Inc., as a regional claims manager for a surplus lines insurance carrier, and as director of risk management for an academic medical



center. Ms. Porto has over 25 years' experience in all areas of risk management, including loss prevention, risk financing and claims management. She served as President of the American Society for Healthcare Risk Management (ASHRM) in 1999 and on the Board of Directors of the National Patient Safety Foundation from 1998 to 2001. She currently serves on The Joint Commission's Patient Safety Advisory Group. Ms. Porto is a Distinguished Fellow of ASHRM and has also attained the designations of Associate in Risk Management (ARM) from the Insurance Institute of America, and Certified Professional in Healthcare Risk Management (CPHRM) from the American Hospital Association. She holds a Bachelor of Science in Nursing and Master of Science in Health Administration from the State University of New York at Stony Brook.

**Sumant Ranji, MD** Sumant is an Associate Professor of Medicine at the University of California, San Francisco (UCSF). Sumant has a strong interest in quality improvement research in both the inpatient and outpatient settings. He has completed systematic reviews of quality improvement strategies for diabetes care, outpatient antibiotic use, and prevention of healthcare-associated infections for the Agency for Healthcare Research and Quality and is actively involved in quality improvement efforts at UCSF Medical Center. He maintains an active clinical and teaching role, including serving as the faculty advisor for the categorical Internal Medicine Residency program journal club and attending on the ward and medical consult services at Moffitt-Long Hospital and Mount Zion Hospital. Sumant received his medical degree from the University of Illinois at Chicago. He completed his Internal Medicine residency training at the University of Chicago and subsequently served as Chief Medical Resident at Cook County Hospital. He joined the UCSF Hospitalist Group in 2004 after completing a two-year fellowship in Hospital Medicine and Clinical Research at UCSF.

**Amanda Ross-White, MLIS, AHIP** Amanda is the Nursing Librarian at the Bracken Health Sciences Library at Queen's University in Kingston, Ontario, Canada and library scientist for the Queen's Joanna Briggs Collaboration, which produces systematic reviews in patient safety topics. Her interest in patient safety began on her first week on the job, helping a pregnant woman with low literacy find resources to explain her unborn child's genetic condition. Since that time, she has explored how connecting both healthcare professionals and patients with the right information is critical for optimum patient care. She is a recognized patient safety trainer through Northwestern University and the Canadian Patient Safety Institute and a Patient Advisor for the Obstetrics and Gynecology Program at Kingston General Hospital. She is also an active public speaker on healthcare from the patient's perspective and is authoring a book on guiding patients through a subsequent pregnancy after a loss.