

## How to get started

These are the steps we took to start an excellence reporting system:

- Take a straw-poll of colleagues – would this be helpful? An in-depth survey is probably not required, but make sure to include views of all staff groups, and levels of experience.
- Chose a format for capturing episodes of excellence. We used an online form, based on the existing incident form for adverse event reporting. Other centres use a simple paper form.
- Keep the data capture simple. We use the following data capture points: who did something excellent? / what did they do? / what can we learn from this? / what might we do differently in the future?
- There is no need to define excellence (although you may have specific metrics in mind). Staff will know it when they see it, so we recommend not giving a definition.
- Make it easy to file a report. You are asking individuals to use a reporting system voluntarily. Therefore it must be quick and easy. We have set up a virtual mail box to allow staff to report excellence by phone (or by mobile communication – we use Vocera, so staff can file a report on the move).
- Provide feedback to reporters: in our system all reporters receive electronic feedback in the form of an email from our governance department.
- Provide notification to the reported staff. This is the most important step, in our experience. In our system, all staff who are reported will receive an electronic citation from our governance department. The email contains the text from the original report, thus providing a formal route for feedback about excellent performance. Other centres use paper certificates.
- Analyse trends and categories. Spend some time studying the themes of reports and select the most important reports to study in more detail – analogous to the SIRI / SUI system. (We call these reverse SIRI).
- Chose a methodology for investigating the most important reports. We have experimented with RCA methodology, but found it too simplistic. We now use Appreciative Inquiry.
- Start small and allow to grow. We started in a single department and are now expanding throughout our organisation.
- Join forces with your safety team. We have found that there is a huge crossover between the themes of excellence reports and adverse incident reports. This raises the possibility of consulting the excellence register to solve problems on the risk register.