UNC Department of Pediatrics Morbidity and Mortality Process

To err is human, even in medicine. When errors occur they present unique opportunities for learning and improvement. Significant errors resulting in suboptimal outcomes generally result from a series of errors or breakdowns in processes and systems. To effectively learn and systemically improve a non-punitive culture of safety, which includes critical error analysis, is essential. Morbidity and Mortality (M&M) Conference is an integral component of an effective organizational analysis and improvement structure. The primary goal of M&M review is to enhance the quality and safety of health care through the analysis and action-focused discussion of adverse or unexpected events and care delivery challenges.

Department of Pediatric M&M Structure and Process (Preparation, and Presentation)

- Guiding Principles for the conference
  - Structured format
  - Promote systems thinking
  - Focus on learning and improvement
- Case selection is based on
  - Patient harm or near-miss with potential for harm AND
  - Opportunity for system redesign, process change, learning/update knowledge of clinical guidelines and best practices, or multidisciplinary discussion of a specific management approach AND
  - Preventable outcome
- Pre-conference case review involves
  - Use of a structured process using tools and key questions (What happened, why and how to prevent; fishbone, etc.)
  - Input from involved individuals
  - Identification of the key care delivery problem and a structured analysis of contributing factors with the input of involved individuals
  - Development of the case presentation for conference and identification of key questions(s) for discussion and literature review.
  - Assignment of responsibility for, and review and approval of content for, case discussion and literature review.

Conference Format

Introduction

- Errors are inevitable but present opportunities to improve
- Errors leading to serious patient harm are rarely the result of just one error but rather due to a series of errors or breakdowns in processes (many of which are known and long standing).
- Every error represents an opportunity to improve a process but these errors need to be recognized and reported so they can be analyzed and result in system-wide learning and performance improvement
Case Presentation
- Case introduction which includes the identified care delivery problem in the opening statement.
- Case content with key factual information: a brief history, pertinent exam and pertinent labs and other diagnostic studies relevant to key question(s) for discussion.

Case Analysis, Discussion and Action Plan
- Concise summary of relevant literature/specialty input based on the care delivery problem and key questions
- Fishbone Diagram or other appropriate tool to promote a structured discussion and identification of key system factors and potential opportunities for improvement (gain insight).
- Action Plan to develop key recommendations for improvement (training or curriculum modifications, policy/procedure/guideline/ protocol modifications, care process modifications, redesign of space, technology, etc.

Summary of key information from case and recommendations

Follow up and Feedback for recommendations proposed at prior M&M conferences: changes implemented, qualitative or quantitative “data” assessing their effectiveness

Conference Roles
Moderator (orchestra conductor skills)
- Outlines goals of M&M and format to be used. Establishes supportive environment that focuses on learning for improvement (not judgment) and systems thinking. Emphasizes that addressing medical errors/potential errors can be done effectively and productively.
- Provides Case introduction
- Conducts focused and structured discussion and identification of recommendations. “Manages” the discussion as needed; reframes comments, reiterates focus on learning and opportunity for improvement
- Summarizes case and recommendations
- Provides follow-up from prior M&M conferences

Presenter
- Prepares case with mentor/advisor
- Presents case (5-10 minutes), key questions and literature review