Realizing Educational Advancement for Collaborative Health (REACH)

Developing Collaborative Health Care Providers for Safe, High Quality Care

WELCOME!

To
The Clinical Transformations in Quality & Collaborative Care
MISSION

Clinical Transformations is geared towards improving team functions.

The emphasis should be on team communication and not clinical management!!!
TEAM STRUCTURE

- Team structure is the glue that holds together an effective strategy for ensuring patient safety and reducing medical error, taking into account the knowledge, performance, skills, and attitudes of medical team members.

WHAT DEFINES A TEAM?

Two or more people who interact dynamically, interdependently, and adaptively toward a common and valued goal, have specific roles or functions, and have a time-limited membership.
EFFECTIVE TEAM MEMBERS

“Achieve a mutual goal through interdependent and adaptive actions”

PARADIGM MUST SHIFT TO TEAM SYSTEM APPROACH

- Dual focus (clinical and team skills)
- Team performance
- Informed decision-making
- Clear understanding of teamwork
- Managed workload
- Sharing information
- Mutual support
- Team improvement
- Team efficiency
WHAT is TeamSTEPPS?

“TeamSTEPPS is an evidence-based program aimed at optimizing performance among teams of healthcare professionals – enabling them to respond quickly and effectively to whatever situations arise.”

HISTORY of TeamSTEPPS

TeamSTEPPS was created by the Department of Defense (DoD) and the Agency of Healthcare Research and Quality (AHRQ)

- A teamwork system which offers a powerful solution to improving collaboration and communication
- Found to be one of the key initiatives within patient safety
- Found to minimize medical errors and prevent patient injury and harm
- Will transform the culture within healthcare
Key PRINCIPLES of TeamSTEPPS

- Leadership
- Situation Monitoring
- Mutual Support
- Communication

KEY PRINCIPLES

- **Leadership**
  
  “Holds teamwork systems together to create the climate that allows teamwork to flourish and are linked by three essential elements of leadership.”
LEADERSHIP: THREE ESSENTIAL ELEMENTS

1. Leaders must constantly monitor the situation to better anticipate team members’ needs and effectively manage the resources to meet those needs.

2. Leaders must communicate effectively with their team members to model appropriate behavior and reinforce and reward that behavior when it is exhibited by team members.

3. Leaders must foster an environment of mutual support by role-modeling.

LEADERSHIP: TWO TYPES

- **Designated** – The person assigned to lead and organize a designated core team, establish clear goals, and facilitate open communication and teamwork among team members

- **Situational** – Any team member who has the skills to manage the situation-at-hand
LEADERSHIP REQUIRES DELEGATION

4 STEPS TO THE DELEGATION PROCESS

1. Determine what to delegate
   Consider priorities, work requirements, and availability of resources

2. Determine to whom to delegate
   Consider skill, availability, scope of practice

DELEGATION Continued…

3. Communicate clear expectations of what needs to be done.
   Communicate the plan, as well as the tasks to be completed

4. Request feedback
   Verify task completion and outcomes
   Recognize achievement
KEY PRINCIPLE

- Leadership
- **Situation Monitoring**

“A key component of teamwork process and is intimately linked to the other three essential elements of leadership. It concerns the willingness and ability to continually monitor situations and share this awareness with fellow team members.”

SITUATION MONITORING

Situation monitoring is the process of actively scanning behaviors and actions to assess elements of the situation or environment.
SITUATION MONITORING

- It is enhanced by team leadership, given that team leaders encourage and role model supportive behaviors.

- Allows mutual support through the ability to anticipate other team members’ needs with accurate knowledge of their responsibilities.

- Moderated by communication, which allows for the sharing of new and emerging information with other team members to retain a shared mental model.

Does He Share The Team’s Shared Mental Model?
SITUATION MONITORING
CROSS MONITORING

“Process of monitoring the actions of other team members for the purpose of sharing the workload and reducing or avoiding errors.”

- A mechanism to help maintain accurate situation awareness
- A way of “watching each other’s back”
- The ability of team members to monitor each other’s task execution and give feedback during task execution

Cross Monitoring Video
**KEY PRINCIPLES**

- Leadership
- Situation Monitoring
- **Mutual Support**
  
  “Mutual support enables teams to function effectively. It is the essence of teamwork. In a healthcare environment, one team member's work overload may result in fatal consequences. Mutual support provides a safety net to help prevent errors, increase effectiveness, and minimize strain caused by work overload. Overtime, continuous mutual support fosters team adaptability, mutual trust, and team orientation.”

---

**MUTUAL SUPPORT: THREE ESSENTIAL ELEMENTS**

- Because mutual support involves the willingness and preparedness to **assist other team members** during operations, it is enhanced by team leadership, given that team leaders encourage and role model "back-up" behaviors.
- Mutual support is derived from situation monitoring through the ability to **anticipate patient needs**, as well as **other team members' needs** with accurate knowledge of their responsibilities. (Recall that a clear assessment of the situation is requisite to providing support.)
- Mutual support is also **moderated by communication** that influences the delivery and ultimate effectiveness of the mutual support.
MUTUAL SUPPORT: TASK ASSISTANCE

- Task assistance is guided by situation monitoring because situation awareness allows team members to effectively identify the need for assistance by others on the team.

If you need help, ask for it.

MUTUAL SUPPORT: FEEDBACK

- Another type of mutual support is feedback.

“Feedback is information provided for the purpose of improving team performance. The ability to communicate self-improvement information in a useful way is an important skill in the team improvement process. Feedback can be given by any team member at any time.”
MUTUAL SUPPORT: ADVOCACY AND ASSERTION

- Advocacy and assertion interventions are invoked when a team member’s viewpoint does not coincide with that of a decision maker.

- In advocating for the patient and asserting a corrective action, the team member has an opportunity to correct errors or the loss of situation awareness.

- Failure to employ advocacy and assertion has been frequently identified as a primary contributor to the clinical errors found in malpractice cases and sentinel events.
MUTUAL SUPPORT: ADVOCACY AND ASSERTION

- You should **advocate for the patient** even when your viewpoint is unpopular, is in opposition to another person’s view, or questions authority.

- When advocating, **assert your viewpoint** in a firm and respectful manner. You should also be persistent and persuasive, providing evidence or data for your concerns.

KEY PRINCIPLES

- Leadership
- Situation Monitoring
- Mutual Support
- **Communication**

“Communication is the lifeline of a well-functioning team. Improving the quality of information exchange decreases communication-related errors.”
The Joint Commission: Importance of Communication

“Ineffective communication is a root cause for nearly 66 percent of all sentinel events reported.”*


COMMUNICATION

FOUR INFORMATION TECHNIQUES:
1. SBAR
2. Call-Out
3. Call-Back/Check-Back
4. Handoff
1. SBAR

Communicate the following information:
- **Situation**—What is going on with the patient?
- **Background**—What is the clinical background or context?
- **Assessment**—What do I think the problem is?
- **Recommendation**—What would I recommend?

SBAR provides...

A framework for team members to effectively communicate information to one another

*Remember to introduce yourself...*
2. CALL-OUT

- A call-out is a tactic used to communicate critical information during an emergent event.
- Critical information called out in these situations helps the team anticipate and prepare for vital next steps in patient care.
- It also benefits a recorder when present during a code or emergent event.
- One important aspect of a callout is directing the information to a specific individual.
Call-Out Video

3. CALL/CHECK-BACK

“A call/check-back is a closed-loop communication strategy used to verify and validate information exchanged.”

- Sender initiates a message
- Receiver accepts the message
- Receiver confirms what was communicated
- Sender verifies the message that was received.
Check-Back Video

4. HANDOFF

• When a team member is temporarily or permanently relieved of duty, there is a risk that necessary information about the patient might not be communicated.

• The handoff strategy is designed to enhance information exchange at critical times such as transitions in care.

• More important, it maintains continuity of care despite changing caregivers and patients.
Handoffs include the transfer of knowledge and information about the degree of uncertainty (or certainty about diagnoses, etc.), response to treatment, recent changes in condition and circumstances, and the plan (including contingencies). In addition, both authority and responsibility are transferred. Lack of clarity about who is responsible for care and for decision-making has often been a major contributor to medical error (as identified in root cause analyses of sentinel events and poor outcomes).
PUTTING IT ALL TOGETHER

• **Team Events**
  Using the tools and strategies presented in this training.

  Apply the tools and strategies for your simulation encounter.

PUTTING IT ALL TOGETHER

TEAM EVENTS

- Briefs – planning
- Huddles – problem solving
- Debriefs – process improvement

*Leaders are responsible to assemble the team and facilitate team events*

*But remember…*

*Anyone can request a brief, huddle, or debrief*
PUTTING IT ALL TOGETHER
BRIEF

Planning
- Form the team
- Designate team roles and responsibilities
- Establish climate and goals
- Engage team in short and long-term planning

Brief Video
PUTTING IT ALL TOGETHER
HUDDLE

Problem solving
- Hold ad hoc, “touch-base” meetings to regain situation awareness
- Discuss critical issues and emerging events
- Anticipate outcomes and likely contingencies
- Assign resources
- Express concerns

Huddle Video
PUTTING IT ALL TOGETHER
DEBRIEF

Process Improvement
- Brief, informal information exchange and feedback sessions
- Occur after an event or shift
- Designed to improve teamwork skills
- Designed to improve outcomes
  - An accurate reconstruction of key events
  - Analysis of why the event occurred
  - What should be done differently next time

Debrief Video
USING TeamSTEPPS

Can you think of an example in which you already use TeamSTEPPS?

THANK YOU FOR VIEWING TeamSTEPPS

Please remember to visit the web links provided in the helpful links to view the orientation vignettes and to complete your pre-session survey.

See you at the CAPE…