Video-Triggered Teamwork Training Guide

Table of Contents

DOWNLOADS AND LINKS

    Training Video YouTube Link: https://youtu.be/J5dCwogtXRk

    Continuing Medical Education Application (Sample): https://rb.gy/y4b2ju

PART 1: VIDEO-TRIGGERED TEAMWORK TRAINING

The Problem

Preventable adverse events are estimated to be a leading cause of death globally. Teamwork is necessary for providing high quality and safe patient care thereby helping to reduce preventable adverse events.

The Solution: Teamwork Training

> **Teamwork training is a systematic process through which a team improves their teamwork knowledge, skills and communication.**

Teamwork and communication are teachable skills and improvement leads to better and safer care. Effective teamwork and communication doesn't happen automatically - the best health care professionals are mindful of their own behavior and that of others. Currently available simulation-based education approaches are effective, but also have substantial barriers to adoption:

1. Time away from work for facilitator training

2. Time to conduct and participate in training

3. Access to specialized simulation equipment

Video-Triggered Teamwork Training Framework

We have developed a training framework that is designed to be a *practical* method of simulation-based training in essential teamwork skills. This tool provides an easy-to-use, out-of-the-box, resource-light solution. It will help you begin your journey to improvement and better, safer care. Our training framework is composed of five parts:

➔ Facilitator preparation

➔ Participant briefing

➔ Video scenario

➔ Small group discussions

➔ Learning reinforcement

Advantages to Video-Triggered Teamwork Training

Can be delivered in one hour to conveniently fit into routinely available protected time for professional development

No formal training is needed to facilitate or deliver this teamwork training. This guide will help you successfully facilitate this teamwork training

Can be delivered in any setting and only requires a computer with a presentation screen that includes basic video and audio capabilities

Key Recommendations for Using this Training Framework

We encourage the selected facilitator to become familiar with Part II of this guide and the video prior to the training session to maximize the chances of a successful learning experience. It is recommended that you involve hospital leadership in the planning of this program. This may include department chairs or executive leadership. These leaders can be very helpful in achieving multidisciplinary participation in the program.

Encouraging Attendance

There are some strategies to strengthen attendance at the session. One strategy is offering continuing education credit for this session. A completed sample CME application can be found in the supplemental facilitator materials and can be adapted for your organization. Additionally, providing food at the event can be an easy way to encourage participation and create a casual environment that can foster small group participation during the debriefing. Even something small, such as donuts or cookies, can draw participants.

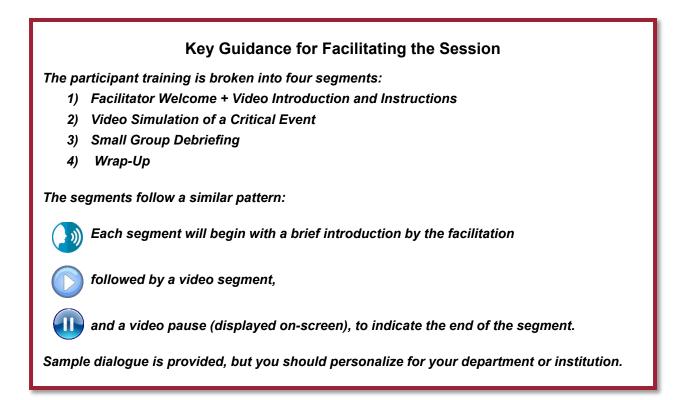## Resource Requirements for this Training Exercise

1. 55 minutes of protected time to conduct the training

2. Meeting space with an appropriate amount of room for the participants to work in groups of 4-5 during the breakout debriefing discussions

3. Facilitator to lead the session who can dedicate one to two hours of preparatory work to review the guide and video. Consider adding a second facilitator for groups larger than 20 participants

4. Computer, speakers, and screen to show the video segments

5. Three participants at a minimum, there is no maximum

6. Participant materials (printed)

7. Facilitator materials (printed)

8. If CME/CEU credit is provided by the facility, the necessary documentation and questionnaire - on site or electronically post-session

9. Facilitator-initiated participant follow-up emails 48 hours and 6 weeks after the session

The specific goals of this teamwork training include:

- Identify key tactics for effective communication

- Promote application of these tactics in day-to-day clinical work

PART 2: FACILITATOR GUIDE

Key Guidance for Facilitating the Session

The participant training is broken into four segments:

1) *Facilitator Welcome + Video Introduction and Instructions*
2) *Video Simulation of a Critical Event*
3) *Small Group Debriefing*
4) *Wrap-Up*

The segments follow a similar pattern:

Each segment will begin with a brief introduction by the facilitation

followed by a video segment,

and a video pause (displayed on-screen), to indicate the end of the segment.

Sample dialogue is provided, but you should personalize for your department or institution.

---

1) Facilitator Welcome + Video Introduction and Instructions (~5 minutes)

Explain the importance of team training.
"Health care errors are estimated to be a leading cause of death globally. Teamwork is necessary for providing high quality and safe patient care thereby helping to reduce preventable adverse events."

Set goals for the session.
"The goals for the session today are to understand key tactics for effective team communication so that we can apply these tactics in our day to day clinical work."

Share an overview of the day (see sample agenda).

Set the tone for the session.
"This is a safe learning environment, and we are all here to better communicate as a team. Putting aside role and seniority gives us the best chance to learn from each other and to practice communicating and listening which make us a stronger team. If we discuss our own experiences, be respectful of others and avoid naming individuals."

Play the Welcome and Introduction to Teamwork Training video. You will use this video for the remainder of the training by pressing pause at the end of each section and resuming when instructed.

Answer questions participants have on the learning objectives or agenda for the day.

2) Video Simulation of a Critical Event (~10 minutes)

Hand out participant worksheets. Give a brief introduction on how to use the worksheet.
"*Does anyone have questions? Does everyone have a participant worksheet?"*

Play the simulated critical event scenario.

Pause for writing on worksheet, then break into groups.
Breakout groups can be preassigned. We suggest 4-5 interdisciplinary participants per group with a range of seniority.
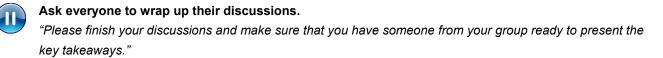
3) Debriefing (~20 minutes)

Introduce debriefing session with comments.
"We will take about two minutes for you to finish your notes on your worksheet, then we will break into small groups. Please ensure your group has a range of roles and seniority as multiple perspectives will promote richer discussion. Once your group is set, take a moment for each member introduce themselves. As a reminder, everyone has a voice and should have a turn to talk. The prompts on the screen will keep your group on track with the worksheet. Make sure to leave time for the key takeaways at the end. Once the time is up we will have one member from each group share the key takeaways with everyone. Your group should have someone taking notes and also choose who will be the group spokesperson."

> *As the facilitator you will monitor the discussions in small groups as a roving observer. Be prepared to help groups that have fallen silent by stimulating the conversation with some debriefing prompts or questions of your own. Often, simply asking the participants if they've had personal experiences similar to the events in the video scenario will liven up the discussion.*

Once everyone is in their small groups press play on the video. Debriefing guide topic prompts will play for 20 minutes. These are timed to help the small groups stay on track.
As needed, prompt participants to reflect on their personal experience. *"Have you seen something like this in your own clinical practice? What went well and what didn't go well?"*

Ask everyone to wrap up their discussions.
"Please finish your discussions and make sure that you have someone from your group ready to present the key takeaways."

4) Wrap-Up (~ 20 minutes)

Call on the spokesperson from each small group to share their group's key takeaways. If you have a large group, consider having groups put their key takeaways on a whiteboard or sticky notes, then you can pick some or all to review with the group.

"*Let's have each small group share the most important lessons that can change the way they work - this should be something they can do differently from now on to be a better team member. "*

> *For those familiar with TeamSTEPPS, asking them to consider the application of TeamSTEPPS tactics to the scenario can stimulate a new line of discussion. Participants can be encouraged to discuss the use of "CUS" AND "SBAR" for example.*

Draw the conversation to a close by summarizing common themes reported out by the small groups, or highlighting a few takeaways that could be immediately adopted to improve teamwork communication.
"Please think of one or two small changes that you could make beginning today that would make you a better communicator with your teammates."

Play video of effective teamwork communication.
"We will now watch an example of the surgical team working together and exemplifying good teamwork communication tactics. Consider how the behaviors displayed in this second scenario correspond to those discussed today."

Hand out the Communications Tools You Can Use sheet and provide closing remarks.
"Thank you for participating in today's exercise. I am providing a Communications Tools You Can Use resource to help remind you of simple tactics for sharing information and speaking up effectively. I will touch base by email in a couple days to share today's key takeaways and resources as well as collect your feedback on today's session. In about a month a second short survey will ask you to think about what today's lessons have meant in your work between now and then. As you leave, we'll provide you with a report on some of the conclusions drawn by others who have used this training module."

After the Session (emails and survey)

48 hours after the session

Send an email to participants revisiting the key learning objectives discussed during the wrap up discussion. Attach the Communications Tools You Can Use document found in the supplemental facilitator resources. This resource will help remind participants of simple tactics for sharing information and speaking up effectively. In the follow up email, please include the link to the follow- up participant survey (embedded in the email template supplement) which will take about five minutes to complete and will provide data to improve the program. Also, consider providing the list of additional resources, also found in the supplemental facilitator resources, to those participants who want to learn more about debriefing and expand their skills in this area (optional).

Six weeks after the session

Send an email to participants revisiting some of the key learning objectives discussed during the session. Invite them to comment on ways in which they have observed or applied these in their clinical practice. The goal is to reinforce the major learning points learned during the training.

ADDITIONAL MATERIALS AND RESOURCES

Facilitator Checklist

❏ **Schedule the session.** Grand rounds or continuing education conferences are good opportunities. A mix of clinical backgrounds and experiences is ideal but not necessary.

❏ **Book a room that is an appropriate size with audiovisual equipment.** You will need to be able to play a video with audio from a computer. Be sure to test the audiovisual equipment using the video file the day before the session.

❏ **Access and test the video.** Use this link (also found in the facilitator guide table of contents) to access the training video. Be sure to test the video to verify its playback quality.

❏ **Consider ways to increase participation, such as offering continuing education credits and/or snacks.**

❏ **Print materials (if applicable).** This includes both facilitator materials and participant materials (1 per participant).

❏ **Read through the facilitator guide and watch the videos.**[1]

❏ **Constitute the teams for the debriefing (Optional).** 4-5 people per group with a mix of different members of the perioperative team with varying levels of seniority is ideal. If your group is small, you can likely skip this step and make the teams during the session.

❏ **Conduct the session.** See the facilitator guide for detailed steps.

❏ **Provide feedback on the program and recommendations for improvement here.**

❏ **Send a follow up email approximately 48 hours after the session.**

❏ **Send a follow up email approximately 6 weeks after the session.**

---

[1] Critical event simulation begins at 3:00, simulation of better teamwork communication begins at 31:49

Facilitator Agenda (Sample)

We recommend keeping this agenda close by when conducting the session.

Objectives:

- Identify two key tactics for effective communication- sharing information and speaking up.
- Promote application of these tactics in day-to-day clinical work

Facilitator Welcome + Video Introduction	

00:00	**Facilitator welcome**
	      Why we are here
	      Goals
	      Overview
	Facilitator to distribute agenda

00:02	**Play video segment 1** Introduction **Facilitator to distribute worksheets**
00:05	**Questions from participants?**
Video Simulation of a Critical Event	

00:05	**Play video segment 2**
	      Critical event simulation
	      Debriefing instructions

Debriefing	

00:13	**Play video segment 3**
	Small group debriefing
	      Individual reflections
	      Small group discussions
	      Key takeaways

Wrap-up	
00:33	**Small group sharing and summation** Key takeaways reported from each group
00:48	**Play video segment 4** Improved teamwork communication simulation

00:50	**Closing**
	      Thank you
	      Next steps
	      Additional resources to be emailed out
	Facilitator to distribute Communications Tools You Can Use sheet

00:52	**End training**

Teamwork Training Participant Agenda (Sample)

Objectives:

- Identify two key tactics for effective communication- sharing information and speaking up
- Promote application of these tactics in day-to-day clinical work

2 minutes	**Welcome** Why we are here Goals Overview
3 minutes	**Video introduction**
8 minutes	**Simulation video #1:** Operating room critical event **Video instructions for debrief** *Utilize Participant Worksheet*
20 minutes	**Debriefing** Individual reflections Small group discussions Key takeaways *Utilize Participant Worksheet*
15 minutes	**Small group sharing and summation** Key takeaways reported from each group
2 minutes	**Simulation video #2:** Improved teamwork communication
2 minutes	**Closing** Next steps and additional resources to be provided over email

Teamwork Training Participant Worksheet

Record your thoughts as you watch the video. Pay special attention to how the clinicians in the video **share information** and **speak up,** as these topics will be discussed in small groups after the video.

Simulation Observations

Sharing Information

_____

_____

_____

Speaking Up

_____

_____

_____

Small Group Discussion   **recommended total duration: ~20 minutes**

Share General reactions	**~2 minutes**

What are everyone's initial reactions to the video scenario?

Discuss tactics for sharing information	**~3 minutes**

- What are some examples of when team members failed to share information effectively?
  - What behaviors did you see?
- Why do you think these behaviors might exist in the clinical environment?
- Have you observed similar behavior in your own work?
- What are strategies that could have helped the team in the video scenario share information?

Discuss tactics for effectively speaking up	**~3 minutes**

- What are some examples of team members failing to speak up?
  - What behaviors did you see?
- Why do you think these behaviors might exist in the clinical environment?
- Have you observed similar behavior in your own work?
- What are strategies that could have helped the team in the video scenario speak up?

Practice effective communication skills and strategies	**~4 minutes**

Members of the small group should assume the roles of the nurse, surgeon and anesthesiologist and practice what they'd say next about the code cart after the initial suggestion is resisted. What would the nurse say next and how might the surgeon or anesthesiologist react - and why?

Prepare key takeaways - to be reported out by a member of each small group	**~8 minutes**

- How can you share information and/or speak up more effectively than you do now?
- What will you do to help your team communicate more effectively?

Teamwork Training: Communication Tools You Can Use

Video triggered team training aims to bring awareness to the importance of team communication. In your small groups you recognized what happens when a team does not effectively share information and discussed strategies to improve team communication. Below are some suggestions to help you apply these tactics in your daily clinical practice.

Speak Up

- Be direct and speak in a firm and respectful tone.
- Share your assessment out loud. Some clinicians process data mentally without sharing their assessment. Speak up with a summary of the important facts, presumed diagnosis and management plan.
- A structured approach to raise a concern can be useful. The CUS technique provides a tool for advocacy, assertion and mutual support. To use CUS start with stating your **concern** followed by why you are **uncomfortable**. If the conflict is not resolved, state that there is a **safety** issue. Discuss in what way the concern is related to safety. If the safety issue is not acknowledged, a supervisor should be notified.

Speak Effectively

- State your concern, the perceived problem and potential solutions.
- If you feel you haven't been heard, try progressively more assertive language. Enlist a colleague to help get the message across.
- A structured approach can be useful in a crisis. One example is SBAR, where you state the **S**ituation, **B**ackground, **A**ssessment, and **R**ecommendations. Other formats exist and it's perfectly fine to create your own to help you be thorough and organized.
- Avoid speaking to the "air" to be sure the message is directed to the appropriate person(s). Close the loop of communication with a "check back" which is when the receiver of information repeats back what they heard, and the person giving the message confirms if it is correct. This is especially useful when following requests to give medications. We don't speak like this in normal conversation, but in patient care it's an important safety practice.

Speak for the Patient

- Advocate for your patient. If you see something you think is unsafe or have questions about a safety issue, say something.
- Sometimes we are fearful of being wrong or appearing ignorant. Speak up and don't let these concerns compromise the safety of the patient.

For more information and resources on teamwork and communication, contact AHA Team Training.

teamtraining@aha.org | 312-422-2609 | aha.org/teamtraining

Sign-Up Sheet (Sample)

Please provide name, position, and email below to be included in future opportunities to reinforce the learning points covered today.

Name	Position	Email

Post-Training Follow-Up Emails (Sample)

Send approximately <u>48 hours</u> after the session. Please customize the portions as indicated.

Dear [*Participants/Colleagues/Team*],

Thank you for participating in the video-triggered team training session. I appreciate that you took the time out of your busy schedule to join the training. The attached Communications Tools You Can Use document provides simple tactics for sharing information and speaking up effectively to help us communicate more effectively as team members in our day-to-day practice. *[attach sheet found in Additional Materials section of facilitator guide]*

Also attached is a sheet with additional resources if you are interested in learning more about debriefing and team training. *[attach sheet found in Additional Materials section of facilitator guide]*

There were many important key takeaways shared by the small groups. These include [*examples of some key takeaways from your session*].

Your feedback on this training is valuable. Please take this [quick five minute survey](#) to help improve future sessions.

Thank you,

[*your name*]

Send approximately <u>6 weeks</u> after the session. Please customize the portions as indicated.

Dear [*Participants/Colleagues/Team*],

I hope that you have been able to use some of the strategies for good team communication that we learned in the video-triggered team training session. The objectives for the session were to understand the key tactics for effective communication and to apply these in our day-to-day clinical work.

The common themes from our session were [*summarize key takeaways from the small groups*].

Have you observed any of these communication strategies since our session? Have you been able to apply these tactics to improve your team communication?

You are welcome to share a time when you have been able to draw on the training and apply the strategies in clinical practice. Or you may opt to [provide additional feedback](#) to Ariadne Labs and the AHA to help improve this training approach.

Thank you,

[*your name*]

RESOURCES FOR DEVELOPING FACILITATION AND DEBRIEFING SKILLS

Memory aids	
Free	Promoting Excellence and Reflective Learning in Simulation (PEARLS) is a debriefing framework available on a physical or electronic pocket card that can serve as a cognitive aid to augment debriefing skills. PEARLS is available free of charge and is open source. **Estimated time commitment: <30 mins** **https://debrief2learn.org/pearls-debriefing-tool/**

Handbooks	
$	The Pocket Book for Simulation Debriefing in Healthcare offers a thorough review of the simulation facilitator literature in an accessible, reader-friendly format. Authored by leading international simulation experts, Dr. Denis Oriot and Dr. Guillaume Alinier, this book shares valuable tips and tricks that can help new debriefers acquire new skills and expert debriefers hone their craft. **Estimated time commitment: Varies** **Available in print or ebook through Amazon, Springer and several others**

Informational audio and video recordings, podcasts	
Free	Simulcast is a podcast dedicated to the discussion of health care simulation. Each episode lasts approximately 30 minutes. They discuss a range of topics relevant to simulation in health care. This resource is great to stay up to date on the most recent trends, but might not provide the basics of facilitation in a unified way. **Estimated time commitment: Varies** http://simulationpodcast.com/category/podcast/
Free	DJ simulationista is the flagship podcast of the Center for Medical Simulation in Boston, Massachusetts. Janice Palaganas and Dan Raemer, CMS faculty and thought leaders in the field of health care simulation, discuss the pressing issues in the field, interview expert guests and dissemble on a variety of topics. Each episode lasts around 20 minutes. This resource is great to stay up to date on the most recent trends, but might not provide the basics of facilitation in a unified way.

Estimated time commitment: Varies

https://itunes.apple.com/us/podcast/center-for-medical-simulation-presents-dj-simulationistas/id1279266822?mt=2

Demian Szyld, MD, EdM is a practicing Emergency Medicine physician at Brigham and Women's Hospital, and current senior director for the Institute for Medical Simulation, Center for Medical Simulation, in Boston Massachusetts. On this episode of the American Thoracic Society's Section on Medical Education Podcast, he covers a variety of topics including the phases of a debriefing, strategies for communicating with participants, creating a psychologically safe learning environment and the subtle nuances of debriefing language.

Estimated time commitment: 50 mins

https://www.thoracic.org/about/ats-podcasts/structured-simulation-debriefings-an-interview-with-demian-szyld.php

The University of Washington provides resources for training new facilitators to deliver simulation-based education. This lesson provides a basic overview of debriefing, considerations in debriefing and some examples of techniques used in debriefing. It is not meant to be comprehensive but will familiarize a novice debriefer to the role and responsibility of a debriefer. You will need to register in order to gain access. Registration is free of charge.

Estimated time commitment: 30-40 mins

https://collaborate.uw.edu/courses/sim-104-briefing-debriefing-key-learning-simulation/

The Royal College of Physicians and Surgeons of Canada offers a video series reviewing the foundational principles for simulation-based education, assessment and research from renowned simulation experts. There are a total of 10 videos each lasting about 20 minutes.

Estimated time commitment: Varies

http://www.royalcollege.ca/rcsite/ppi/courses/simulation-health-care-video-series-e

The National League for Nursing's Simulation Innovation Resource Center provides a series of videos meant to introduce simulation to all who need to understand the unique contributions that this educational strategy simulation brings to the curriculum. The course pack costs 72$ and lasts about 2 hours. There are around 20 courses total in this pack.

Estimated time commitment: Varies

https://sirc.nln.org/mod/page/view.php?id=842

Free

Free

Free

$

Online courses

Sim One Online Course (in-person options available as well)

In-person courses and fellowship programs

The Society for Simulation in Healthcare houses an up-to-date directory on available courses and fellowship programs.