Step It Up!
Integrating TeamSTEPPS® Into IPE Curricula

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WELCOME!

Learning Objectives
1) Describe foundational content associated with TeamSTEPPS®.
2) Outline innovative approaches to integrating TeamSTEPPS® into the interprofessional education of diverse student populations in both the classroom and clinical settings.
3) Identify strategies and opportunities to integrate TeamSTEPPS® into physical therapist education curricula.

Today’s Agenda
1) TeamSTEPPS® Foundational Content
2) The KUMC approach to TeamSTEPPS®
3) The Emory approach to TeamSTEPPS®
4) The MUSC approach to TeamSTEPPS®
5) Small Group Break Out Sessions - Facilitated
6) Report Out from Small Group Sessions
7) Q & A, Summary and Closure

TeamSTEPPS 2.0
Team Strategies and Tools to Enhance Performance and Patient Safety

High-Performing Teams
Teams that perform well:
- Hold shared mental models
- Have clear roles and responsibilities
- Have clear, valued, and shared vision
- Optimize resources
- Have strong team leadership
- Engage in a regular discipline of feedback
- Develop a strong sense of collective trust and confidence
- Create mechanisms to cooperate and coordinate
- Manage and optimize performance outcomes

(Salas, et al., 2004)
Outcomes of Team Competencies

- Knowledge
- Shared Mental Model
- Attitudes
  - Mutual Trust
  - Team Orientation
- Performance
  - Adaptability
  - Accuracy
  - Productivity
  - Efficiency
  - Safety

Team Structure

The ratio of We’s to I’s is the best indicator of the development of a team.

– Lewis B. Ergen

Paradigm Shift to Team System Approach

From (INDIVIDUAL) To (TEAM)

<table>
<thead>
<tr>
<th>From (INDIVIDUAL)</th>
<th>To (TEAM)</th>
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</thead>
<tbody>
<tr>
<td>Single focus (clinical skills)</td>
<td>Dual focus (clinical and team skills)</td>
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<tr>
<td>Individual performance</td>
<td>Team performance</td>
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<tr>
<td>Underinformed decision-making</td>
<td>Informed decision-making</td>
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<tr>
<td>Loose concept of teamwork</td>
<td>Clear understanding of teamwork</td>
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<tr>
<td>Unbalanced workload</td>
<td>Managed workload</td>
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<tr>
<td>Having information</td>
<td>Sharing information</td>
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<td>Self-advocacy</td>
<td>Mutual support</td>
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<td>Self-improvement</td>
<td>Team improvement</td>
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<tr>
<td>Individual efficiency</td>
<td>Team efficiency</td>
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Effective Team Members

- Better able to predict the needs of team members
- Provide quality information and feedback
- Engage in higher level decision-making
- Manage conflict skillfully
- Understand their roles and responsibilities
- Reduce stress on the team as a whole through better performance

“Achieve a mutual goal through interdependent & adaptive actions”

Teamwork Actions

- Assemble a team
- Establish a leader
- Identify the team’s goals and vision
- Assign roles and responsibilities
- Hold team members accountable
- Actively share information among team members
- Provide feedback

“Individual commitment to a group effort—that is what makes a team work, a company work, a society work, a civilization work.”

– Vince Lombardi

Communication
Communication is…

- The process by which information is exchanged between individuals, departments, or organizations
- The lifeline of the Core Team
- Effective when it permeates every aspect of an organization

SBAR Provides…

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

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?

Handoff Consists of…

- Transfer of responsibility and accountability
- Clarity of information
- Verbal communication of information
- Acknowledgment by receiver
- Opportunity to review

Check-Back is…

Sender initiates message
Sender verifies message was received
Receiver accepts message, provides feedback, confirmation

Leadership
Effective Team Leaders
- Define, assign, share, monitor and modify a plan
- Review the team's performance
- Establish "rules of engagement"
- Manage and allocate resources effectively
- Provide feedback regarding assigned responsibilities and progress toward the goal
- Facilitate information sharing
- Encourage team members to assist one another
- Facilitate conflict resolution
- Model effective teamwork

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.

Sharing the Plan: Briefs
A team briefing is an effective way to share a plan.
- Form the team
- Designate team roles and responsibilities
- Establish climate and goals
- Engage team in short- and long-term planning

Problem Solving: Huddle
- 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

Reviewing the Team’s Performance: Debrief
- 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
  - Discussion of lessons learned and reinforcement of successes
  - Revised plan to incorporate lessons learned

Situation Monitoring

"Attention to detail is one of the most important details ..."
–Author Unknown
**A Continuous Process**

- Situation Monitoring (Individual Skill)
- Situation Awareness (Individual Outcome)
- Shared Mental Model (Team Outcome)

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**Situation Monitoring**

(Individual Skill)

Process of actively scanning behaviors and actions to assess elements of the situation or environment:
- Fosters mutual respect and team accountability
- Provides safety net for team and patient/client
- Includes cross-monitoring

... Remember, engage the patient/client whenever possible.

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**A Shared Mental Model is...**

The perception of, understanding of, or knowledge about a situation or process that is shared among team members through communication.

“Teams that perform well hold shared mental models.”

(Rouse, Cannon-Bowers, and Salas, 1992)

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**What Do You See?**

- Mutual Support
- Task Assistance

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**Task Assistance**

Team members foster a climate in which it is expected that assistance will be actively sought and offered as a method for reducing the occurrence of error.

“In support of patient safety, it’s expected!”

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**Characteristics of Effective Feedback**

Good Feedback is—

- **TIMELY**
- **RESPECTFUL**
- **SPECIFIC**
- **DIRECTED** toward improvement
- Helps prevent the same problem from occurring in the future
- **CONSIDERATE**

“Feedback is where the learning occurs.”

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**Advocacy and Assertion**

- **Advocate** for patient/client
- Invoked when team members’ viewpoints don’t coincide with that of a decisionmaker
- Assert a corrective action in a firm and respectful manner

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**Two-Challenge Rule**

Invoked when an initial assertion is ignored...

- It is your responsibility to assertively voice your concern at least two times to ensure that it has been heard
- The member being challenged must acknowledge
- If the outcome is still not acceptable
- Take a stronger course of action
- Use supervisor or chain of command

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**Please Use CUS Words**

but only when appropriate!

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**Tools & Strategies Summary**

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<th>TOOLS and STRATEGIES</th>
<th>OUTCOMES</th>
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<tr>
<td>Inconsistency in Team Membership</td>
<td>Communication</td>
<td>Shared Mental Model</td>
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<tr>
<td>Lack of Time</td>
<td>Cell-Out</td>
<td>Acceptability</td>
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<td>Lack of Information Sharing</td>
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<td>Varying Communication Styles</td>
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<td>Conflict</td>
<td>_<em><strong>STEP</strong></em>_</td>
<td>Health &amp; education systems</td>
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<td>Lack of Coordination and Follow-up With Coworkers</td>
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<td>Collaboration</td>
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<td>Fatigue</td>
<td>_<em><strong>Mutual Support</strong></em>_</td>
<td>Quality improvement education</td>
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<td>Overwork</td>
<td>_<em><strong>Task Assistance</strong></em>_</td>
<td>Prevention strategies</td>
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<td>Misinterpretation of Cues</td>
<td>Feedback</td>
<td>_<em><strong>Crisis</strong></em>_</td>
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<tr>
<td>Lack of Role Clarity</td>
<td>Assertive Statement</td>
<td>_<em><strong>Crisis</strong></em>_</td>
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<tr>
<td>_<em><strong>Two-Challenge Rule</strong></em>_</td>
<td>_<em><strong>CUS</strong></em>_</td>
<td>_<em><strong>DESC Script</strong></em>_</td>
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**Bridging the Education and Practice Gap**
Integrating TeamSTEPPS® Into IPE Curricula

KUMC: Center for Interprofessional Education and Simulation

- Classroom Curriculum
- Clinical Curriculum
- Faculty Development
- Research
- Student Extracurriculum

Curriculum Committee Team Members: Delois Laverentz (SON), Jana Zaudke (SOM), Jennifer Jones (SHP), Michael Waxman (SOM), Renee Hodgkins (SHP), Ryan Gove (Student Life), Serra Goodman (Asst.), Dory Sabata (SHP), Wendy Hildenbrand (SHP), Kristy Johnston (Director CIPES), Steve Jernigan (SHP), and Sarah Shrader (Pharm).

Interprofessional Practice and Education at KUMC

- Foundational Interprofessional Collaboration Program
  - Salina and Wichita campuses
  - Interprofessional Teaching Clinics (Family Medicine and Geriatrics)
  - Faculty Development Initiatives
  - Geriatrics Champions Program (Team-based Learning)
  - Simulations with Standardized Patients (Discharge planning)
  - Interprofessional Ethics Seminars
  - Interprofessional Collaboration around EHR
  - Program-initiated IPE Endeavors
  - Training Clinical Teams in KU Hospital

FIPC: Introduction to TeamSTEPPS®

- Required for all students early in their education at KUMC (first year students targeted)
- Students from 13 professions involved currently:
  - Clinical Lab Science
  - Health Information Management
  - Health Policy and Management
  - Speech Language Pathology
  - Audiology
  - Pharmacy
  - Physical Therapy
  - Occupational Therapy
  - Respiratory Therapy
  - Dietetics and Nutrition
  - Medicine
  - Nursing
  - Nurse Anesthesia

Campus-wide IPE

Foundations of Interprofessional Collaboration: Introduction to TeamSTEPPS®

Level 1 Acquire
Level 2 Apply

KUMC: FIPC – Level 1

**Acquire Activities**
1) Online Module (pre-work)
2) IP Pictionary
   • + Debriefing
3) TeamSTEPPS® Paper Chain Activity
   • + Debriefing
4) TeamSTEPPS® IP Video Triggers
   • + Debriefing

**FIPC Assessment**
- Pre-Event Teamwork Attitudes Questionnaire
- Post-Event Teamwork Attitudes Questionnaire
- Post-Event Evaluation
- Three Weeks Post-Event Evaluation

KUMC: FIPC – Level 2

**Application Activities**
1) Case-based IP Plan of Care
   • Profession-specific information
   • + Debriefing
2) SBAR and CUS
   • Profession-specific information
   • + Debriefing

**Progression of FIPC Activities**

1st Cohort
- Spring 2015 (Fall)
- Level 1: 71 Students
- Level 2: 314 Students
- 10 Faculty Facilitators

2nd Cohort
- Fall 2015 (Fall)
- Level 1: 800 Students
- Level 2: 10 programs
- 60 Faculty Facilitators

**Lessons Learned**
- Logistics are a barrier but can be overcome
- Start small (pilot), do it well and then grow
- Involve students in the planning process
- Plan assessment from the very beginning
- Start early in the students’ education and thread it through
- Faculty development is important for the student experience
- Tap into the clinical environment, to help bridge the gap
- Break down the “we have been working in interprofessional teams for years” mentality
- Persistence is important for changing culture to a team-based model

**Novel Approach @ KUMC**
- Combination of IPEC competency domains and TeamSTEPPS®
- Longitudinal approach – building with each FIPC level
- Practice with specific TeamSTEPPS® tools – ones that are likely to be used in any setting (Brief, Huddle, SBAR, CUS, etc.)
- Very interactive + debriefing after every activity
- Assessing beyond just attitudes, also knowledge, skills and behaviors
- Include professions that provide non-direct patient care
- Dovetails with IPE and IPCP faculty development efforts
- Hospital efforts coincide with academic efforts – will reinforce each other
Integrating TeamSTEPPS® Into IPE Curricula

Emory University Interprofessional Team Training Program

- Curriculum based on the Core Competency Domains for Interprofessional Collaborative Practice
  - Competency Domain 1: Values/Ethics for Interprofessional Practice
  - Competency Domain 2: Roles/Responsibilities
  - Competency Domain 3: Interprofessional Communication
  - Competency Domain 4: Teams and Teamwork

- Utilize TeamSTEPPS® system to address competencies in each domain

Emory Interprofessional Team Training and TeamSTEPPS®

First Session Objectives:
First Year Health Science Students will:
- Explain how breakdowns in interprofessional communication can contribute to patient injury
- Describe the complementary roles played by diverse healthcare professionals
- Demonstrate effective interprofessional communication skills in clinical situations
  - e.g., SBAR, Call Out, Handoff, Check-Back

Second Session Objectives:
Second Year Health Science Students will:
- Identify multi-system teams
- Discuss the role of team leader
- Demonstrate how to managing conflict in the clinical environment
  - e.g., Two-Challenge Rule, CUS, DESC
- Develop patient-centered care in an interprofessional team
Emory Interprofessional Team Training and TeamSTEPPS®

Session Format:
- Large group lecture
- Small group discussion/role play
  – Facilitated by interprofessional faculty

Emory Interprofessional Team Training and TeamSTEPPS®

Session Format:

Student Group 1
- 8:15 Register
- 8:30 - 9:25 Lecture and Panel Discussion
- 9:25 - 9:40 Transfer to small groups
- 9:40 - 10:40 Small Groups

Student Group 2
- 9:30 Register
- 9:45 - 10:40 Lecture and Panel Discussion
- 10:40 - 10:55 Transfer to small groups
- 10:55 - 11:55 Small Groups

Lessons Learned

Build your own TEAM!
- Faculty core planning team
- Administration
- Faculty/ Clinician facilitators
- Support services
- Students

Coordination of IPE activities in University/Healthcare Education
- Identify intersections and opportunities to share resources and to foster interprofessional learning

Develop plans for IPE sustainability and growth

Medical University of South Carolina Academic Health Center: 6 Colleges

TeamSTEPPS® Training in Health Professions Education

Office of Interprofessional Initiatives

TeamSTEPPS® 2.0

Training embedded within:
- Required IP course
  Transforming Health Care for the Future
- Simulation labs
- Hospital QIP
- Elective courses

Required IP Course:
Transforming Health Care for the Future

Students include:
- Cardiovascular perfusion
- Dental medicine
- Health administration
- Medicine
- Nursing
- Occupational therapy
- Pharmacy
- Physical therapy
- Physician assistant

Currently: Target audience is 1st year (pre-clinical) student
Transforming Health Care for the Future

- 700+ total students/year (IP sections of ~ 14 students)
- 16 sections (Fall) & 30 sections (Spring)
- 30+ trained facilitators
- Hybrid course: 4 online modules & 6 face-to-face meetings

Simulation Labs

Innovation: Teaching TeamSTEPPS® Curriculum

IP Faculty Facilitators
Peer-to-peer Teaching
- Students placed into 5 IP groups
- Given 1-2 weeks (depending on semester) and information on accessing TeamSTEPPS® training materials and curriculum
- Creative, multi-media module instruction in 90 minutes!!!

Utilization of Team Performance Observation Tool (TPOT)

Experiential Learning:
Students participate in QIP as reliable observers in clinical setting

Lessons Learned: It takes a village!

Cultivate Champions
- Patient
- Administrative
- Support Services
- Faculty/Clinician
- Student

Next Steps:
- Continued process improvement
- Ex: Longitudinal IP group learning
- Preceptor development
- Ongoing faculty development

Facilitated Small Group Breakouts

Thank You!
**Resources**

- TeamSTEPPS® Training: [http://teamstepps.ahrq.gov/trainingEligibility.htm](http://teamstepps.ahrq.gov/trainingEligibility.htm)
- National Center for Interprofessional Practice and Education: [https://nexusipe.org/](https://nexusipe.org/)
- NCIPE Resource Exchange: [https://nexusipe.org/informing/resource-center](https://nexusipe.org/informing/resource-center)
- NCIPE Preceptors in the Nexus: [https://nexusipe.org/engaging/learning-system/preceptors-nexus-toolkit](https://nexusipe.org/engaging/learning-system/preceptors-nexus-toolkit)