

# Debriefs: An Evidence-based Team Leadership Tool to Improve Performance and Patient Safety

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President, NCPS Board of Directors



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Continuing Education Credit will only be available for participants who attend the live webinar. CE credit is not available for viewing the webinar recording. Participants are in listen-only mode.

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- If we are unable to answer your question during the webinar, we will do our best to provide answers via email after the webinar.

If we experience technical difficulties, and our connection to attendees is lost, we will make one attempt to reconnect and will continue the program.

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Participants must attend the entire event to get CE credit.

All attendees will be emailed a link to an attestation of attendance, and a link to an online program evaluation that we ask you to complete by Wednesday, June 2 in order to receive continuing education credit.



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All attendees will be emailed a link to an online program evaluation that we ask you to complete by Wednesday, June 2 in order to receive continuing education credit.

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- The email that is sent with a link to the program evaluation will contain a pdf attachment with instructions. Please read these!
- Completed profile and CE registration need to be submitted by Wednesday, June 2 in order to receive continuing education credit.



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**Funding Acknowledgement**  
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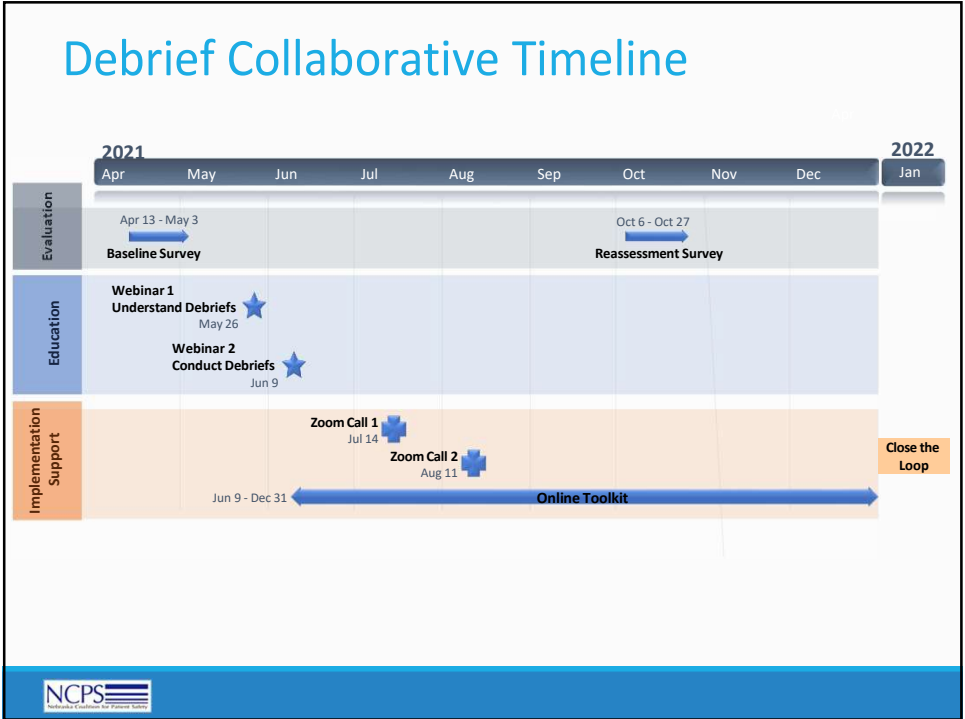
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## Objectives

1. Define debriefs as team meetings in which members discuss and make sense of a recent event in which they collaborated.
2. Recognize debriefs as a team leadership strategy that is integral to all other components of the teamwork system.
3. Explain the structure and organizational context of effective debriefs in which the goal is to improve system outcomes.
4. Summarize the evidence base regarding the impact of effective debriefs on organizational resilience, team performance, and patient outcomes.



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# Objective 1

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Define debriefs as team meetings in which members discuss and make sense of a recent event in which they collaborated.

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## Define Debriefs...what is a debrief?

A specific type of **team** meeting in which members discuss, **make sense** of, and learn from a recent event in which they collaborated. (Scott, Allen, Bonilla, et al., 2013)

- What is a **team**?
  - ✓ Two or more people
  - ✓ Interact dynamically, interdependently, and adaptively
  - ✓ Toward a common and **valued goal** (14% of team function)
  - ✓ Have complementary skills and specific roles (12% of team function)
  - ✓ Have a time-limited membership

(Salas, DiazGranados, Weaver, et al., 2008)



## Make Sense of and Learn from an Event

Sensemaking is “the active process of assigning meaning to ambiguous data.”

“The most fundamental level of data about patient safety is in the lived experience of staff, as they struggle to function within an imperfect system.”

Sensemaking is a conversation among members of an organization about an unexpected, novel or ambiguous event that is conducted by a trained facilitator.

(Battles et al., 2006)

## Sensemaking is a Conversation

- Each team member brings their unique knowledge and experience of the event to the conversation
- A facilitator uses a structured process to help team members combine these unique perspectives into a new shared mental model of what happened
- Team members use this shared mental model to develop an action plan that decreases risks/hazards to individual patients and the system



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(Battles et al., 2006)



## Based on the Goal: 3 Types of Debriefs



### Team Performance Debrief

Goal: Systems Improvement  
Focus: What Happened/Why

### Simulation Debrief

Goal: Formative feedback  
Focus: Improvement in task/team skills

### Critical Incident Stress Debrief

Goal: Prevent and or decrease traumatic stress  
Focus: Individual resilience/recovery

(Twigg, 2020; Harrison and Wu, 2017)



## Clarifying Debrief-Related Terms

(Allen, Reiter-Palmon, Crowe, 2018)

### Military: After Action Review



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### First Responder: After Event Review



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### Aviation: Post-Flight Check



### Healthcare: Briefs, Huddles, Debriefs

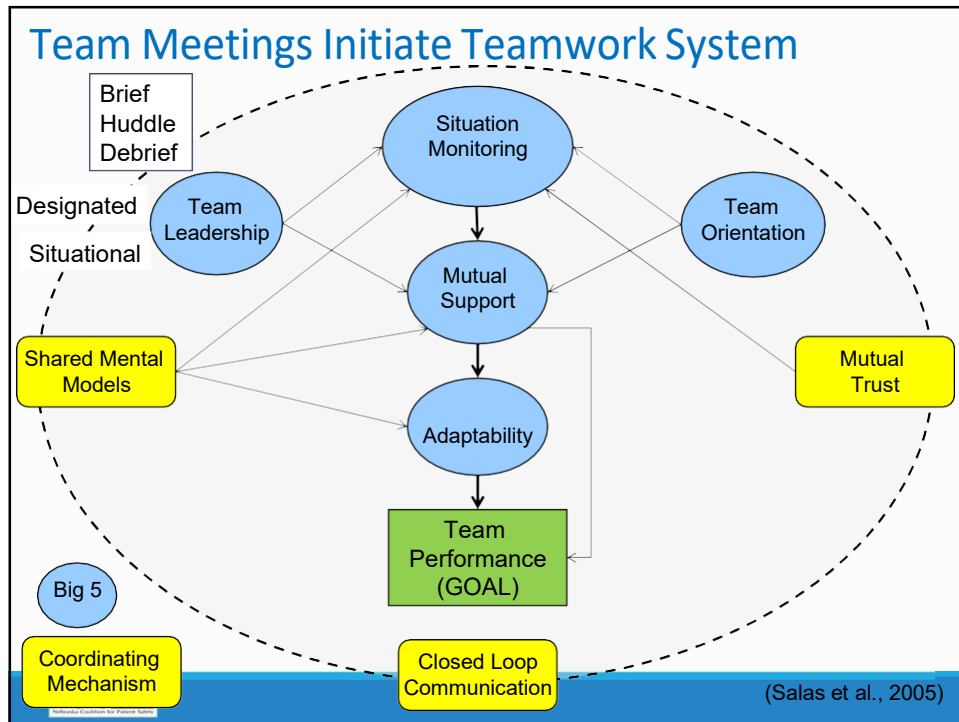


<https://www.umc.edu/patient-safety/capturefalls/learningmodules/huddles.html>



# Objective 2

Recognize debriefs as a team leadership strategy that is integral to all other components of the teamwork system.




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## Team Meetings Manage Performance

Effective team leaders use three types of meetings to manage team performance:




1. Brief: short, planned meeting to share the plan and organize the team
  - ✓ Clarify goals, roles, and responsibilities (delegate)
  - ✓ Anticipate needs, establish contingencies, manage resources
  - ✓ Know the plan, share the plan, review the risks
2. Huddle: ad hoc meeting to monitor and adjust the plan
  - ✓ Share information from individual situation monitoring
  - ✓ Provide opportunities to seek and offer task assistance
3. Debrief: planned or ad hoc meeting to review the plan and team performance after event
  - ✓ Review what happened and why it happened (regarding both task AND teamwork)
  - ✓ Decide what will be done differently for a patient and what can be applied to the system
  - ✓ Provide feedback and resolve conflict

(AHRQ, TeamSTEPPS)


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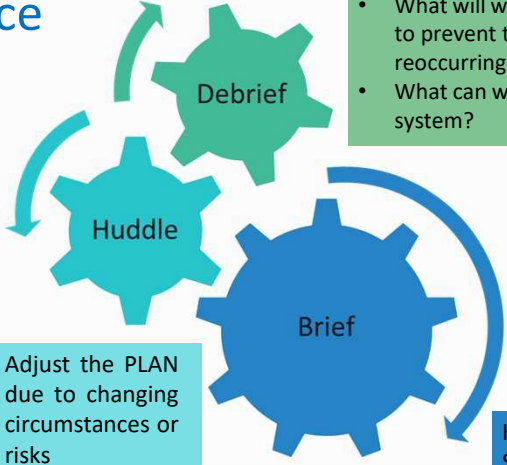
| Briefs  | Huddles   | Debriefs   |
|---|---|--|
|    |              |    |
| <p>Nursing Shift Change</p> <p>Surgical Pre-procedure Check-In, Sign-In, Time-Out</p> <p>Whole Hospital Morning Brief</p> | <p>Called as needed by designated or situational leaders to manage changing circumstances</p> | <p>Falls</p> <p>Medication Errors</p> <p>Surgical Sign-Out Codes</p> <p>Rapid Response</p> <p>Obstetric Incidents</p> <p>System Failures</p> |
| <p>NCPS <small>National Center for Patient Safety</small></p> <p>(AHRQ, TeamSTEPPS)</p> <p>17</p>                         |   |  |

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## Leadership Tools to Manage Team Performance

“Briefs, huddles, and debriefs need to be routine... help establish a culture of safety and ensure successful implementation of safety bundles.”

(Main et al., 2015. National Partnership for Maternal Safety: Consensus Bundle on Obstetric Hemorrhage)



Review the PLAN and team performance after event

- What happened?
- Why did it happen?
- What will we do differently to prevent this event from reoccurring?
- What can we apply to the system?

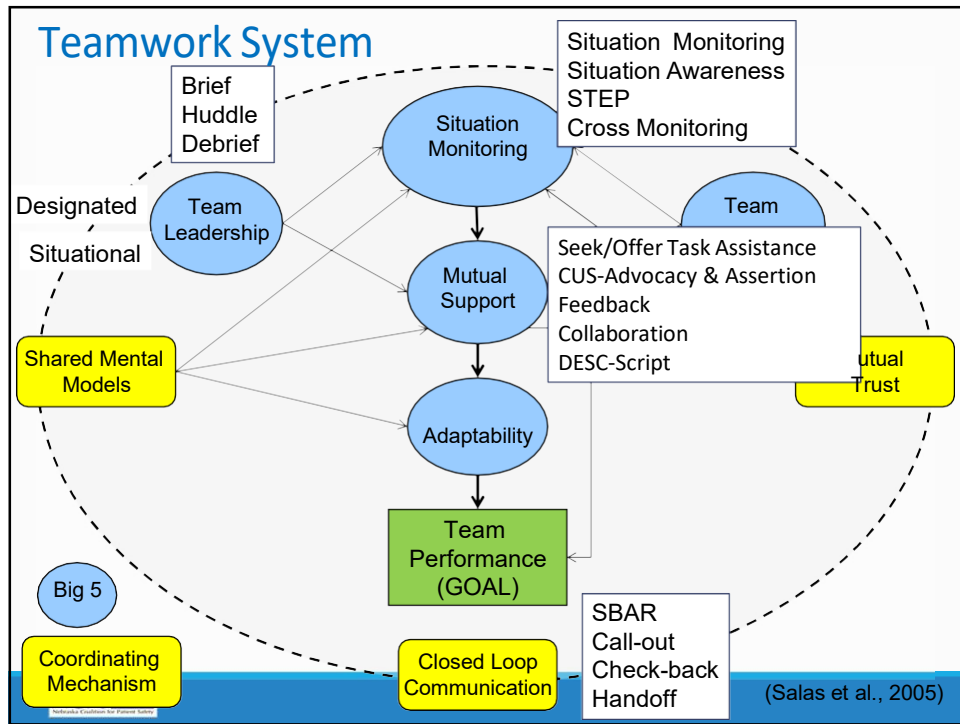
Adjust the PLAN due to changing circumstances or risks

Know the PLAN  
Share the PLAN  
Review the RISKS

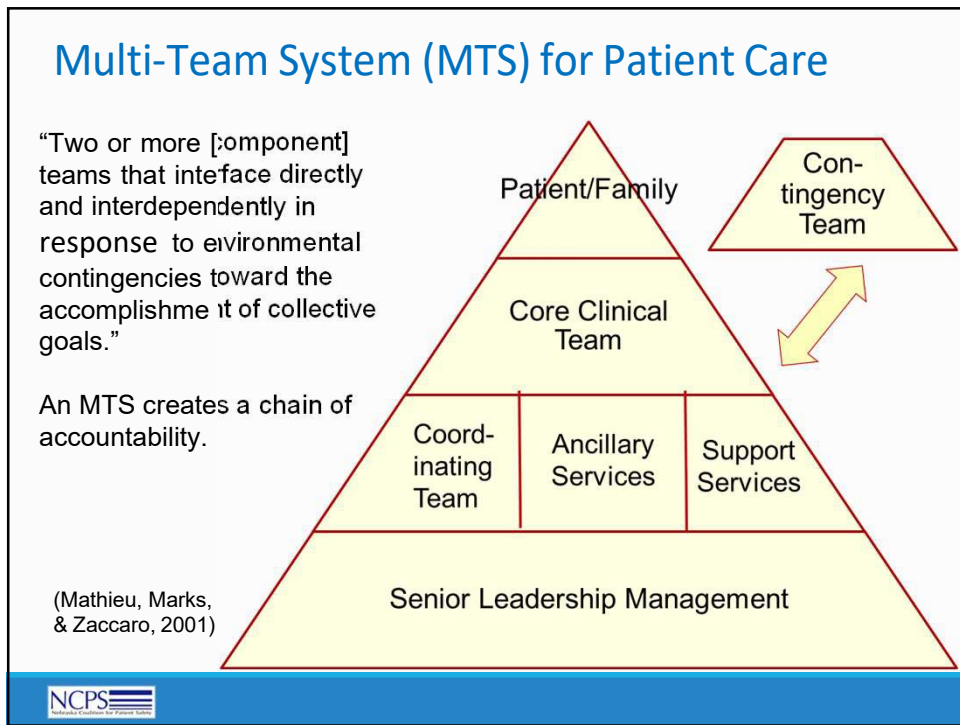
NCPS National Center for Patient Safety

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## Debriefs: First step to implementing a teamwork system



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Train all staff in closed-loop communication, situation monitoring, and mutual support

Coordinating Team trains leaders to conduct briefs and huddles

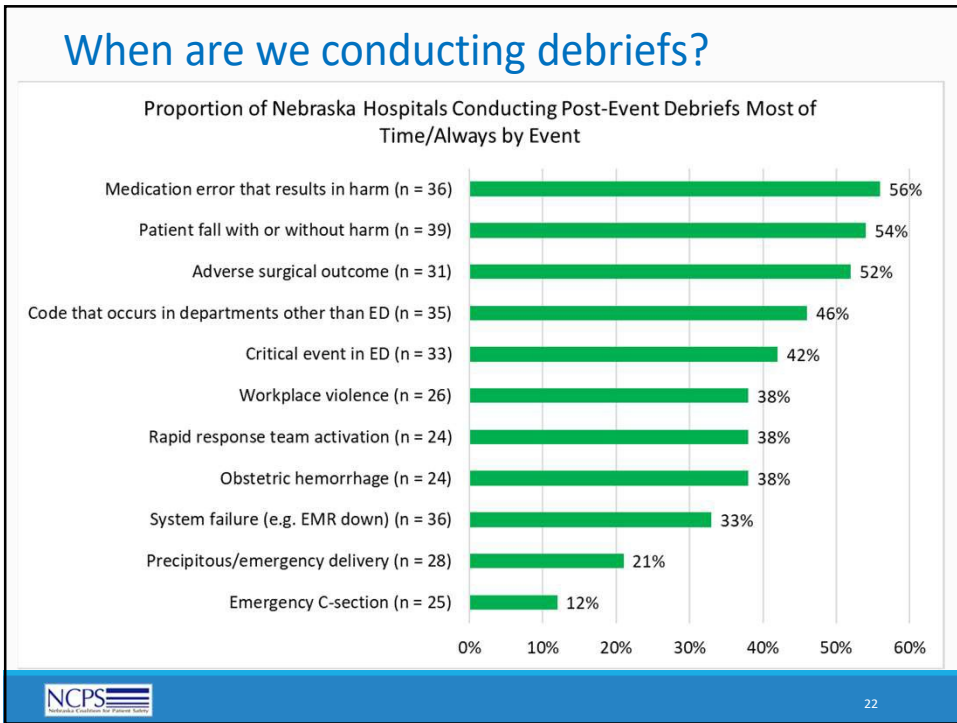
Facilitators elicit team members' situational awareness and provide opportunity to seek/offer task assistance

Trained facilitators conduct debriefs

Coordinating Team standardizes/plans debrief program including leadership training


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# Objective 3

Explain the structure and organizational context of effective debriefs in which the goal is to improve system outcomes.

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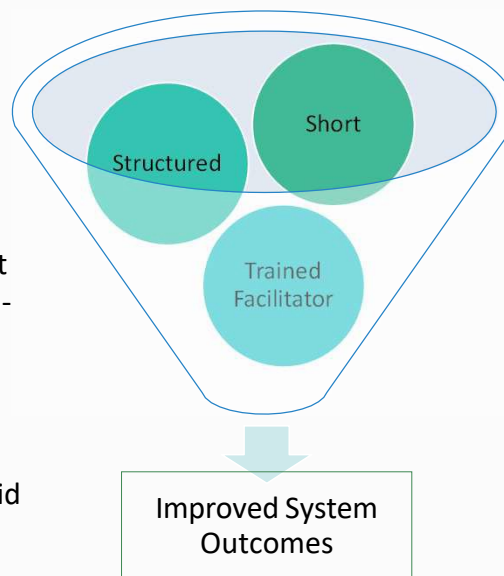
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## Characteristics of Effective Debriefs

(Allen et al., 2019; Tannenbaum & Cerasoli, 2013; Smith-Jentsch et al., 2008; Smith-Jentsch et al., 1998)

### Structure is Needed to...

- ✓ Ensure focus on specific situation AND on how decisions were made (right decision and right decision-making process)
- ✓ Avoid conflict
- ✓ Summarize both positive (what went well) and negative feedback (what did not go well)



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## Characteristics of Effective Debriefs

(Allen et al., 2019; Tannenbaum & Cerasoli, 2013; Smith-Jentsch et al., 2008)      Examples available at: <https://www.nepatientsafety.org/members/patient-safety-toolkits/>

### Generic Structure

- ✓ Create a safe environment
- ✓ Begin with those with least status
- ✓ What happened?
- ✓ Why did it happen?
- ✓ What will we do differently to prevent recurrence of this event? (consider task and teamwork)
- ✓ What can we apply to the system?

### Event/Context Specific Structure

- ✓ Peri-natal Events (e.g. OB Hemorrhage)
- ✓ Post-fall Huddle
- ✓ Surgery – (Integral to Comprehensive Surgical Checklist)

**Improved System Outcomes**

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## Context of Effective Debriefs

(Allen et al., 2019)

### Psychological Safety

“A climate in which people feel free to express relevant thoughts and feelings.” (Edmondson, 2012)

### Organizational Support

Restructure the organization and clarify roles to provide people, training, time to implement changes; overtly value the change (Rogers, 2003; Allen et al., 2012)

### Sensemaking

“...the active process of assigning meaning to ambiguous data.” (Edmondson, 2012)

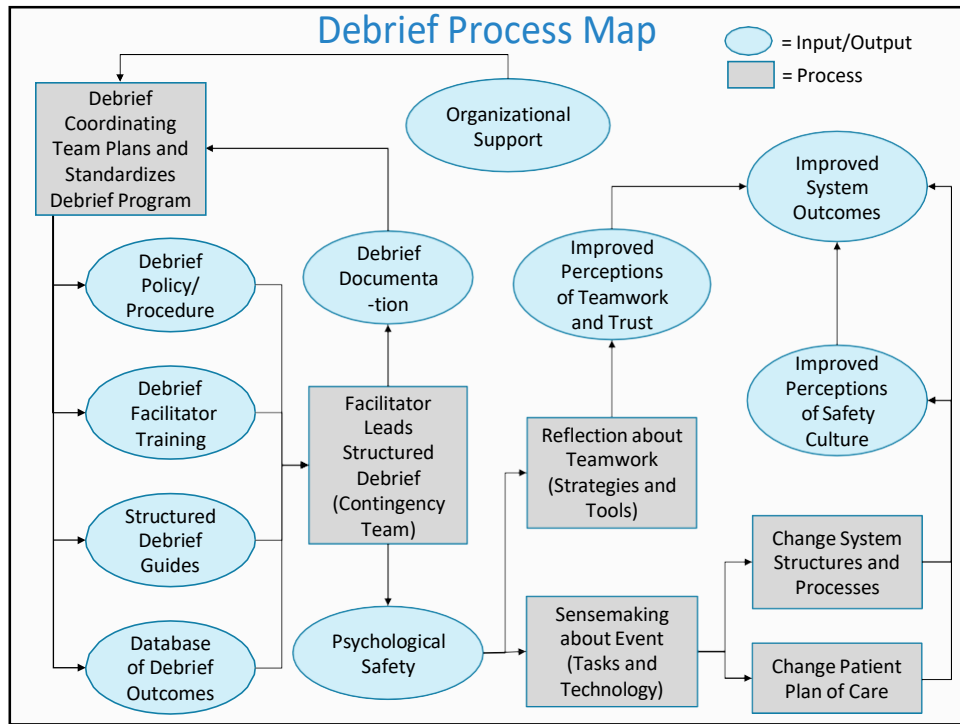
### Team Reflexivity

Extent to which team members reflect upon the team’s goals, decision-making strategies, and processes (West, 2000)

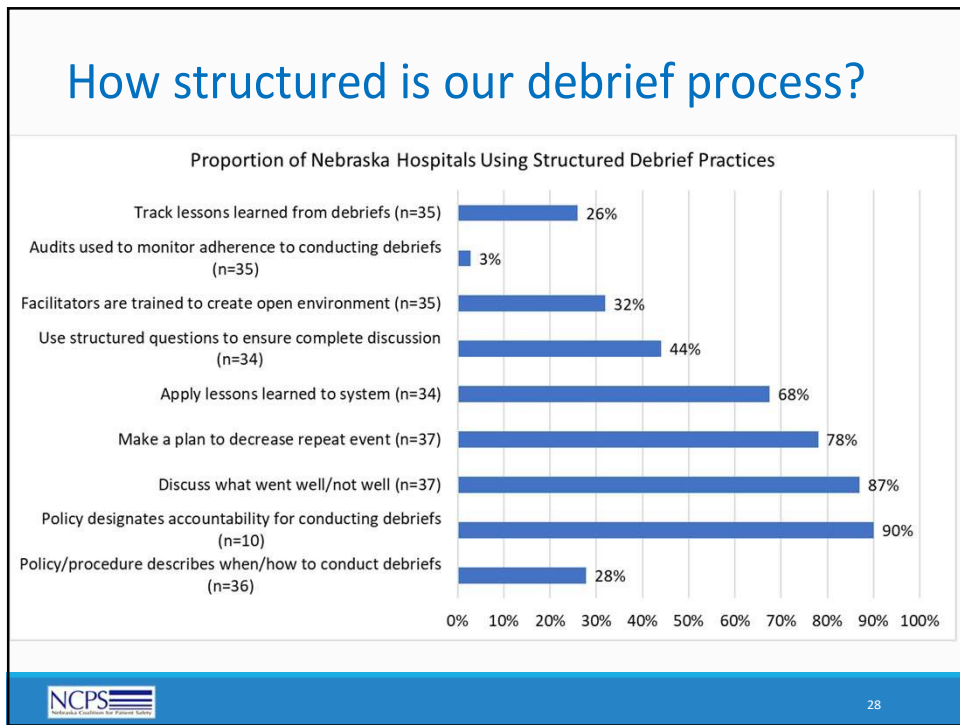
**Improved System Outcomes**

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# Objective 4

Summarize the evidence base regarding the impact of effective debriefs on organizational resilience, team performance, and patient outcomes.

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## Debriefs Improve Organizational Resilience

Systematic review of 36 studies sought to understand factors associated with resilient health care. Resilience refers to a system's ability to manage complexity and changing conditions; especially in complex sociotechnical systems. Resilience requires the ability to anticipate (e.g. a brief), monitor and respond (e.g. a huddle), and learn (e.g. a debrief). The following factors contributed to resilience:

- Implementing effective teamwork (i.e. team meetings, closed-loop communication, and leadership).
- Frequent exchange of information between experts and novices.
- Integrating diverse perspectives during team meetings.
- Using protocols and checklists.
- Creating a shared mental model of work as imagined and work as done.

**Conclusion:** The ability to adjust and adapt is integral to resilience. Implementing briefs, huddles, and debriefs are key strategies to improve organizational resilience in response to internal and external challenges.

(Ifaifel et al, 2020; Hollnagel et al., 2006).

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## Debriefs Improve Team Performance

Meta-analysis of 46 studies across diverse disciplines (e.g. psychology, medicine, military, government) in which debriefs about specific events included active learning for improvement purposes using multiple sources of information (e.g. a team). Performance was measured before and after debriefing.

- Conducting debriefs improved performance by 25%
- Conducting facilitated debriefs were three times more effective than unfacilitated debriefs
- Highly structured debriefs were more effective than less structured debriefs

**Conclusion:** Organizations can improve team performance by implementing structured debriefs conducted by trained facilitators.

(Tannenbaum & Cerasoli, 2013)



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## Debriefs Improve Management of OB Hemorrhage

Case study of tertiary hospital with 4,500 births/year that established a policy to debrief after all critical perinatal events. Certified nurse midwives were designated and trained to facilitate debriefs using a structured debriefing form.

Conducting debriefs was associated with:

- 33% decrease in incidence of massive transfusion with 5+ units of blood
- 78% decrease in incidence of unplanned hysterectomies not related to placenta accreta or percreta
- No readmissions for postpartum hemorrhage
- Improved adherence to new clinical practices and ability to identify system weaknesses

**Conclusion:** Improving patient safety using debriefs requires trained facilitators and a “safety action team” (i.e. coordinating team) to coordinate the debriefing program and ensure implementation of recommended system improvements. (Corbett et al., 2012)



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## Alliance for Innovation on Maternal Health (AIM)

National maternal safety/quality improvement initiative based on interdisciplinary consensus-based practices to promote adoption of evidence-based safety bundles that integrate briefs, huddles, and debriefs (ACOG)

- Obstetric Care for Women with Opioid Use Disorder
- Obstetric Hemorrhage
- Safe Reduction of Primary Cesarean Birth
- Severe Hypertension in Pregnancy

(Council on Patient Safety in Women's Health Care)

Readiness (BRIEFS)

Recognition & Prevention (HUDDLES)

Response

Reporting/Systems Learning (DEBRIEFS)

Readiness (BRIEFS)

Recognition & Prevention (HUDDLES)

Response

Reporting/Systems Learning (DEBRIEFS)

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Reporting/Systems Learning (DEBRIEFS)

Readiness (BRIEFS)

## Debriefs Improve OR Safety, Efficiency and Culture

Implementing debriefs associated with:

- Improved perceptions of safety climate/culture among neurosurgical (Magill et al., 2017) and general OR staff (Leong et al., 2017)
- Improved perceptions of teamwork and communication among OR staff (Berenholtz et al., 2009)
- Improved identification and mitigation of OR inefficiencies (Wolf et al., 2010; Magill et al., 2017) and defects in instrumentation and communication (Bandari et al., 2012)
- Prevention of potential adverse events (Magill et al., 2017)
- Surgical teams with frequent changes in team members may benefit the most from briefs and debriefs (Leong et al., 2017)

**Conclusion:** Briefings and debriefings in the OR can each be done in less than 3 minutes (Berenholtz et al., 2009). They are practical/feasible strategies to prospectively identify and mitigate clinical and operational defects in surgical care and improve perceptions of safety culture and teamwork (Bandari et al., 2012).



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## Joint Commission: 7 Reasons to Debrief Every Time

Debriefing process during surgical sign-out ...

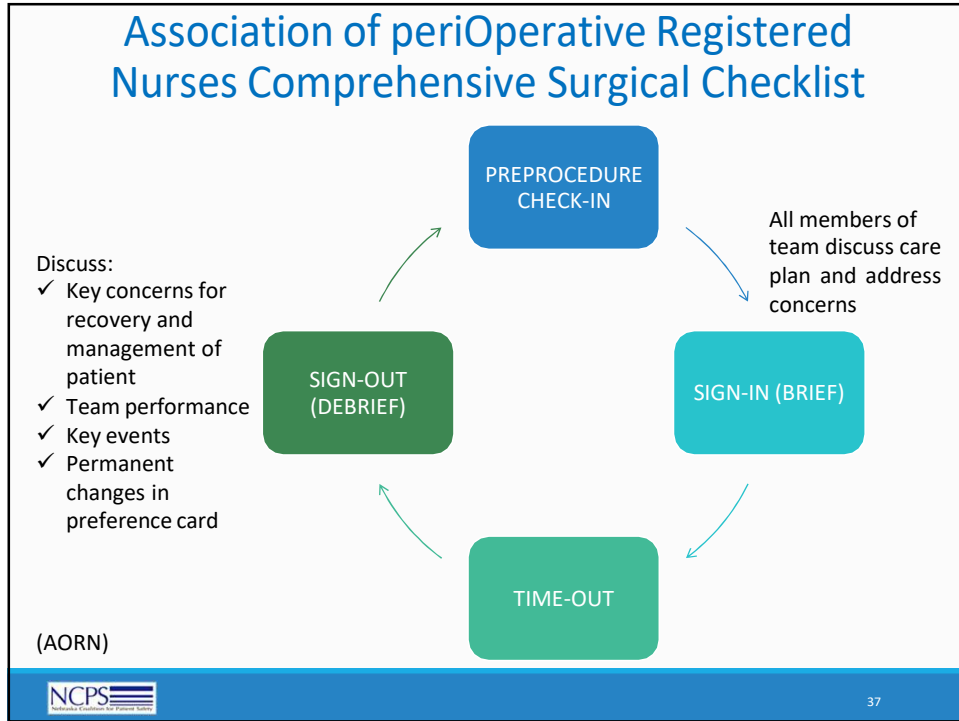
1. Ensures a shared mental model of confirmed count, blood loss, pain management, and VTE prophylaxis.
2. Provides team members opportunity to identify improvements in efficiency and patient safety, as well as any defects in care.
3. Provides opportunity for all team members to confirm and discuss the plan for patient care transition from the OR to another team.
4. Identifies care relevant to specific patient populations.
5. Using focused questions tailored to the procedure increases sustainability.
6. Stopping unnecessary activities and conversations improves debrief effectiveness.
7. Using checklists/guides ensures standardization and consistency.

(Spruce, 2018)

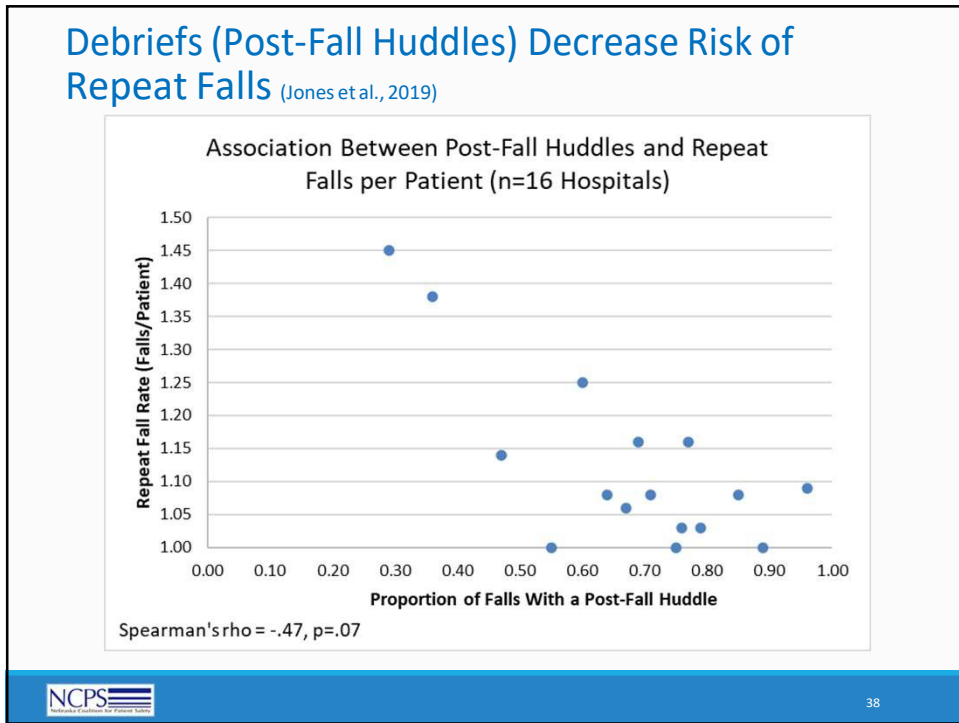


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## Debriefs (Post-Fall Huddles) Improve Perceptions of Teamwork and Safety Culture (Jones et al., 2019)

As compared to ~ 450 respondents who did not participate in post-fall huddles, those ~ 260 who participated in at least one post-fall huddle had more positive perceptions of

- Team structure to support fall-risk reduction (e.g. My unit/department has clearly articulated goals for fall-risk reduction; 86% vs. 93%)
- Leadership support for fall-risk reduction (e.g. My supervisor/manager provides opportunities to discuss the unit/department’s performance after a patient fall; 78% vs. 91%)
- Organizational Learning (e.g. We are actively doing things to improve patient safety; 91% vs. 96%)
- Nonpunitive Response to Error (e.g. When an event is reported, it feels like the person is being written up, not the problem; 56% vs 69%)
- Teamwork across Hospital Depts (e.g. Hospital departments work well together to provide the best care for patients; 76% vs. 86%)
- Hospital Handoffs and Transitions (e.g. Important patient care information is often lost during shift changes; 50% vs. 63%)

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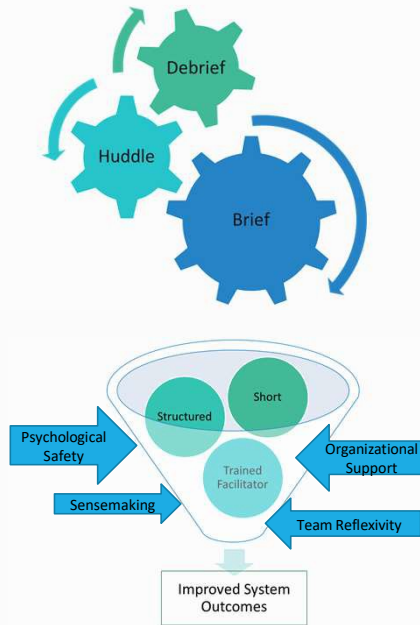
## Summary

Debriefs are team meeting in which members discuss, make sense of, and learn from a recent event in which they collaborated.

Briefs, huddles, and debriefs initiate the teamwork system.

Effective debriefs are conducted by a trained facilitator who uses a structured guide to ensure psychological safety and team reflection.

Structured debriefs may be generic or event specific and used by clinical and non-clinical teams to improve system outcomes.



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## Before June 9 Webinar: Review Examples

### Checklist for Video Examples of Debriefs

- ✓ Did the facilitator create a safe, psychologically safe environment?
- ✓ Did the facilitator use a structured approach to conduct the debrief?
- ✓ Was the team member with the least status/power invited to share their perspective (preferably early in the debrief)?
- ✓ Did multiple team members share their perception of what happened regarding technical care/tasks?
- ✓ Did multiple team members share their perception of what happened regarding teamwork and communication?
- ✓ Did the team develop a clear plan to prevent a recurrence of the event?
- ✓ Did the team discuss how to apply lessons learned to the system as a whole?



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## Before June 9 Webinar: Review Examples

1. **Effective Huddle and Debrief in a Medical Office.** In this example, a situational leader and a designated leader ensure an effective response to a changing workload and system improvement.

Agency for Health Care Leadership and Quality. TeamSTEPPS Office Based Care.

[https://www.ahrq.gov/teamstepps/officebasedcare/2\\_leadership\\_good/index.html](https://www.ahrq.gov/teamstepps/officebasedcare/2_leadership_good/index.html)

2. **Post-Fall Huddle Good Example.** In this example, an effective facilitator leads to an effective debrief and system improvement.

University of Nebraska Medical Center. CAPTURE Falls. Post-Fall Huddle Tools. <https://www.unmc.edu/patient-safety/capturefalls/tool-inventory.html>

Available at: <https://www.youtube.com/watch?v=ZlqAmNEL6Q4>



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## Before June 9 Webinar: Review Examples

3. **Post-Fall Huddle Bad Example.** In this example an ineffective facilitator results in an ineffective debrief.

University of Nebraska Medical Center. CAPTURE Falls. Post-Fall Huddle Tools. <https://www.unmc.edu/patient-safety/capturefalls/tool-inventory.html>

Available at: <https://www.youtube.com/watch?v=tCy0vk5MWW4>

4. **Successful Team Formation in Subacute Care.** In this example effective teamwork including situation monitoring, advocacy and assertion (CUS), closed-loop communication, SBAR and a debrief results in timely attention to a safety issue and acknowledgment of effective team performance. Note how the person with least status feels free to speak up and suggest system improvements during the debrief.

Agency for Healthcare Leadership and Quality. TeamSTEPPS 2.0 for Long Term Care. Teamwork Success (Subacute). Available at: <https://www.youtube.com/watch?v=5FsA3k7pDEU>



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## NCPS Debrief Toolkit

Generic Debrief Pocket Guide

OB Hemorrhage

Council On Patient Safety In Women's Health Care  
Patient Safety Bundles

Post-Fall Huddle

AORN Comprehensive Surgical Checklist

Template for Debrief Log

Template for Debrief Policy/Procedure

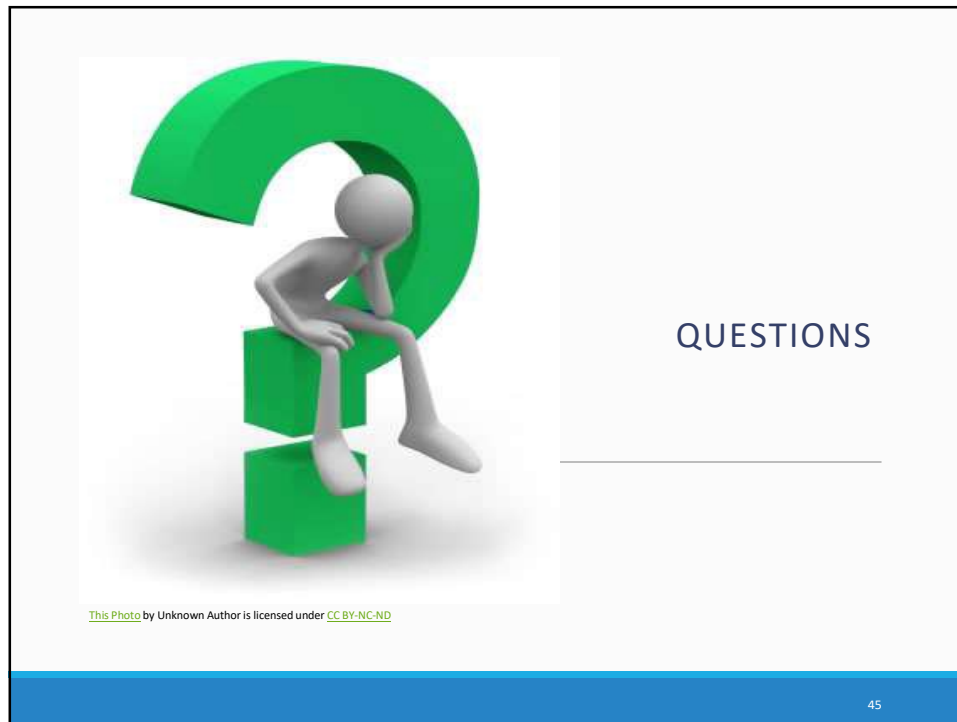
Available at:

<https://www.nepatientsafety.org/members/patient-safety-toolkits/>



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#### REFERENCES

- AORN. AORN Comprehensive Surgical Checklist. Available at:  
<https://www.aorn.org/guidelines/clinical-resources/tool-kits/correct-site-surgery-tool-kit/aorn-comprehensive-surgical-checklist>
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