

Interprofessional Collaborator Assessment Rubric

Instructions: For each of the statements below, circle the number which corresponds to the performance of the learner.

1	2	3	4	5	6	7	8	9	N/O
Well Below Expected		Below Expected		Expected	Above Expected		Well Above Expected		Not Observable

Communication: Ability to communicate effectively in a respectful and responsive manner with others (“others” includes team members, patient/client, and health providers outside the team).

Resident...											N/O
Communicates with others in a confident, assertive, and respectful manner.	1	2	3	4	5	6	7	8	9		<input type="checkbox"/>
Communicates opinion and pertinent views on patient care with others.	1	2	3	4	5	6	7	8	9		<input type="checkbox"/>
Uses communication strategies (verbal & non-verbal) appropriately in a variety of situations.	1	2	3	4	5	6	7	8	9		<input type="checkbox"/>
Communicates in a logical and structured manner	1	2	3	4	5	6	7	8	9		<input type="checkbox"/>

Collaboration: Ability to establish/maintain collaborative working relationships with other providers, patients/clients and families.

Resident...											N/O
Establishes collaborative relationships with others.	1	2	3	4	5	6	7	8	9		<input type="checkbox"/>
Integrates information and perspectives from others in planning and providing patient/client care.	1	2	3	4	5	6	7	8	9		<input type="checkbox"/>
Shares information with other providers that is useful for the delivery of patient/client care.	1	2	3	4	5	6	7	8	9		<input type="checkbox"/>

Roles and Responsibility: Ability to explain one’s own roles and responsibilities related to patient/ client and family care (e.g. scope of practice, legal and ethical responsibilities); and to demonstrate an understanding of the roles, responsibilities and relationships of others within the team.

Resident...											N/O
Describes one’s own roles and responsibilities in a clear manner with the team/patient/family.	1	2	3	4	5	6	7	8	9		<input type="checkbox"/>
Demonstrates professional judgement when assuming or delegating tasks.	1	2	3	4	5	6	7	8	9		<input type="checkbox"/>
Shares evidence-based or best practice discipline-specific knowledge with others.	1	2	3	4	5	6	7	8	9		<input type="checkbox"/>

Collaborative Patient/Client-Family Centred Approach: Ability to apply patient/client-centred principles through interprofessional collaboration.

Resident...											N/O
Seeks input from patient/client and family.	1	2	3	4	5	6	7	8	9	<input type="checkbox"/>	
Shares options and health care information with patients/clients and families.	1	2	3	4	5	6	7	8	9	<input type="checkbox"/>	

Team Functioning: Ability to contribute to effective team functioning to improve collaboration and quality of care.

Resident...											N/O
Demonstrates recognition of the relationship between team functioning and quality of care.	1	2	3	4	5	6	7	8	9	<input type="checkbox"/>	
Contributes to interprofessional team discussions.	1	2	3	4	5	6	7	8	9	<input type="checkbox"/>	

Conflict Management/Resolution: Ability to effectively manage and resolve conflict between and with other providers, patients/clients and families.

Resident...											N/O
Seeks the perspectives and opinions of others.	1	2	3	4	5	6	7	8	9	<input type="checkbox"/>	
Seeks clarification in a respectful manner when misunderstandings arise.	1	2	3	4	5	6	7	8	9	<input type="checkbox"/>	
Uses appropriate conflict resolution strategies to manage and/or resolve conflict.	1	2	3	4	5	6	7	8	9	<input type="checkbox"/>	

With **respect to collaboration ability**, compared to other residents you have previously interacted with, this resident was:

1	2	3	4	5	6	7	8	9
Well Below Average	Below Average		Average	Above Average		Well Above Average		

Comments regarding the resident's collaboration ability: _____

Comments regarding the study or ICAR: _____

INTERPROFESSIONAL PROFESSIONALISM ASSESSMENT

DRAFT

**Developed by the Interprofessional Professionalism Collaborative
September 20, 2011 (final draft)**

INTERPROFESSIONAL PROFESSIONALISM ASSESSMENT

Purpose:

The purpose of the Interprofessional Professionalism Assessment (IPA) is to evaluate an entry-level health professional's demonstration of professionalism when interacting with members of other health professionals.

Application:

The Interprofessional Professionalism Assessment can be used by health professionals to evaluate themselves or others including learners, peers, supervisors, or subordinates.

Definition:

Interprofessional professionalism: "Consistent demonstration of core values evidenced by professionals working together, aspiring to and wisely applying principles of ¹, altruism and caring, excellence, ethics, respect, communication, accountability to achieve optimal health and wellness in individuals and communities."

¹Stern DT. *Measuring Medical Professionalism*. Oxford University Press. New York, NY; 2006:19.

Directions:

Use the rating scale provided below, please rate each of the items based on your overall impressions and observations of the **individual's behavior** throughout the practice experience. Complete your final assessment of the individual at the conclusion of the practice experience. Definitions are provided as a context for each of the categories provided.

Rating Scale:

SD = Strongly disagree; D = Disagree; A = Agree; SA = Strongly agree; N/O = No opportunity to observe in this environment

Communication

Communication: Impart or interchange of thoughts, opinions or information by speech, writing, or signs; "the means through which professional behavior is enacted." (Arnold and Stern in Stern 2006)

- | | | | | | | |
|--|-----------------------------|----------------------------|----------------------------|----------------------------|-----------------------------|------------------------------|
| 1. Works with members of other health professions to coordinate communication with patients/clients and family members. | <input type="checkbox"/> SD | <input type="checkbox"/> D | <input type="checkbox"/> N | <input type="checkbox"/> A | <input type="checkbox"/> SA | <input type="checkbox"/> N/O |
| 2. Demonstrates active listening with members of other health professions. | <input type="checkbox"/> SD | <input type="checkbox"/> D | <input type="checkbox"/> N | <input type="checkbox"/> A | <input type="checkbox"/> SA | <input type="checkbox"/> N/O |
| 3. Communicates respectfully with members of other health professions. | <input type="checkbox"/> SD | <input type="checkbox"/> D | <input type="checkbox"/> N | <input type="checkbox"/> A | <input type="checkbox"/> SA | <input type="checkbox"/> N/O |
| 4. Communicates with members of other health professions in a way they can understand, without using profession-specific jargon. | <input type="checkbox"/> SD | <input type="checkbox"/> D | <input type="checkbox"/> N | <input type="checkbox"/> A | <input type="checkbox"/> SA | <input type="checkbox"/> N/O |
| 5. Responds to questions posed by members of other health professions in a manner that meets the needs of the requester. | <input type="checkbox"/> SD | <input type="checkbox"/> D | <input type="checkbox"/> N | <input type="checkbox"/> A | <input type="checkbox"/> SA | <input type="checkbox"/> N/O |

Provide comments related to the behaviors associated with Communication, including those that are positive and those needing improvement.

INTERPROFESSIONAL PROFESSIONALISM ASSESSMENT

Respect

Respect: "Demonstrate regard for another person with esteem, deference and dignity . . . personal commitment to honor other peoples' choices and rights regarding themselves . . . includes a sensitivity and responsiveness to a person's culture, gender, age and disabilities . . . the essence of humanism . . . signals the recognition of the worth of the individual human being and his or her belief and value system." (Arnold and Stern in Stern, 2006)

- | | | | | | | |
|---|--|---------------------------------------|---------------------------------------|---------------------------------------|--|------------------------------|
| 6. Demonstrates confidence, without arrogance, while working with members of other health professions. | <input type="checkbox"/> SD | <input type="checkbox"/> D | <input type="checkbox"/> N | <input type="checkbox"/> A | <input type="checkbox"/> SA | <input type="checkbox"/> N/O |
| 7. Recognizes that other health professions may have their distinct cultures and values, and shows respect for these. | <input type="checkbox"/> SD | <input type="checkbox"/> D | <input checked="" type="checkbox"/> N | <input type="checkbox"/> A | <input type="checkbox"/> SA | <input type="checkbox"/> N/O |
| 8. Respects the contributions and expertise of members of other health professions. | <input type="checkbox"/> SD | <input checked="" type="checkbox"/> D | <input type="checkbox"/> N | <input checked="" type="checkbox"/> A | <input type="checkbox"/> SA | <input type="checkbox"/> N/O |
| 9. Seeks to understand the roles and responsibilities of members of other health professions as related to care. | <input checked="" type="checkbox"/> SD | <input type="checkbox"/> D | <input type="checkbox"/> N | <input type="checkbox"/> A | <input checked="" type="checkbox"/> SA | <input type="checkbox"/> N/O |
| 10. Determines patient care roles and responsibilities in a respectful manner with members of other health professions. | <input type="checkbox"/> SD | <input checked="" type="checkbox"/> D | <input type="checkbox"/> N | <input type="checkbox"/> A | <input type="checkbox"/> SA | <input type="checkbox"/> N/O |

Provide comments related to the behaviors associated with Respect, including those that are positive and those needing improvement.

Altruism and Caring

Altruism and Caring: Overt behavior that reflects concern, empathy, and consideration for the needs, values, welfare, and well-being of others and assumes the responsibility of placing the needs of the patients or client ahead of the professional interest.

- | | | | | | | |
|---|-----------------------------|----------------------------|----------------------------|----------------------------|-----------------------------|------------------------------|
| 11. Offers to help members of other health professions when caring for patients. | <input type="checkbox"/> SD | <input type="checkbox"/> D | <input type="checkbox"/> N | <input type="checkbox"/> A | <input type="checkbox"/> SA | <input type="checkbox"/> N/O |
| 12. Demonstrates empathy for members of other health professions. | <input type="checkbox"/> SD | <input type="checkbox"/> D | <input type="checkbox"/> N | <input type="checkbox"/> A | <input type="checkbox"/> SA | <input type="checkbox"/> N/O |
| 13. Models for other health professionals compassion towards patients/clients, families and caregivers. | <input type="checkbox"/> SD | <input type="checkbox"/> D | <input type="checkbox"/> N | <input type="checkbox"/> A | <input type="checkbox"/> SA | <input type="checkbox"/> N/O |
| 14. Places patient/client needs above own needs and those of other health professionals. | <input type="checkbox"/> SD | <input type="checkbox"/> D | <input type="checkbox"/> N | <input type="checkbox"/> A | <input type="checkbox"/> SA | <input type="checkbox"/> N/O |

Provide comments related to the behaviors associated with Altruism and Caring, including those that are positive and those needing improvement.

INTERPROFESSIONAL PROFESSIONALISM ASSESSMENT

Excellence

Excellence: Adherence to, exceeds, or adapts best practices to provide the highest quality care.

15. Coordinates with other health professions and the patient/client, family and caregivers to produce an optimal plan of care. SD D N A SA N/O
16. Reviews all relevant documentation from other health care professions prior to making recommendations to plan of care. SD D N A SA N/O
17. Contributes to decisions about patient care regardless of hierarchy/profession-based boundaries. SD D N A SA N/O
18. Works with members of other health professions to assure continuity of care for patients. SD D N A SA N/O

Provide comments related to the behaviors associated with Excellence, including those that are positive and those needing improvement.

Ethics

Ethics: Consideration of a social, religious, or civil code of behavior in the moral fitness of a decision of course of action, especially those of a particular group, profession, or individual, as these apply to every day delivery of care.

19. Interacts with members of other health professions in an honest and trustworthy manner. SD D N A SA N/O
20. Works collaboratively with members of other health professions to resolve conflicts that arise in the context of caring for patients/clients. SD D N A SA N/O
21. Discusses with members of other health professions any ethical implications of healthcare decisions. SD D N A SA N/O
22. Reports or addresses unprofessional and unethical behaviors when working with members of other health professions. SD D N A SA N/O

Provide comments related to the behaviors associated with Ethics, including those that are positive and those needing improvement.

INTERPROFESSIONAL PROFESSIONALISM ASSESSMENT

Accountability

Accountability: Accept the responsibility for the diverse roles, obligations, and actions, including self-regulations and other behaviors that positively influence patient and client outcomes, the profession, and the health needs of society.

23. Engages with members of other health professions in quality assurance/improvement activities. SD D N A SA N/O
24. Seeks clarification from members of other health professions about unclear information. SD D N A SA N/O
25. Accepts consequences for his or her actions without redirecting blame to members of other health professions. SD D N A SA N/O
26. Works with members of other health professions to identify and address errors and potential errors in the delivery of care. SD D N A SA N/O

Provide comments related to the behaviors associated with Accountability including those that are positive and those needing improvement.

Overall Strengths related to Interprofessional Professionalism

Areas for Improvement related to Interprofessional Professionalism

Relational Coordination Survey

1. Frequent Communication	How frequently do people in each of these groups communicate with you about [insert focal work process/client population]?
2. Timely Communication	Do they communicate with you in a timely way about [insert focal work process/client population]?
3. Accurate Communication	Do they communicate with you accurately about [insert focal work process/client population]?
4. Problem Solving Communication	When there is a problem with [insert focal work process/client population], do people in each of these groups blame others or work with you to solve the problem?
5. Shared Goals	Do people in each of these groups share your goals for [insert focal work process/client population]?
6. Shared Knowledge	Do people in each of these groups know about the work you do with [insert focal work process/client population]?
7. Mutual Respect	Do people in each of these groups respect the work you do with [insert focal work process/client population]?





RELATIONAL COORDINATION ANALYTICS

MEASURE • CONNECT • TRANSFORM

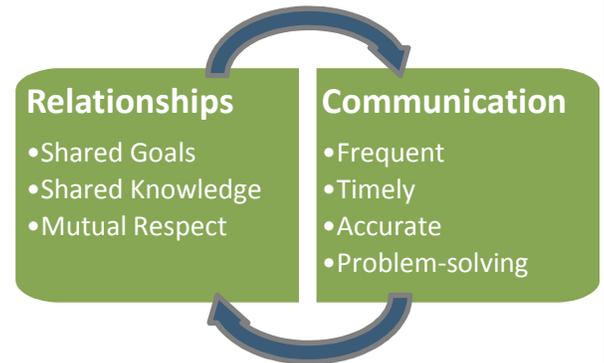
Transforming Relationships for High Performance

WHAT IS RELATIONAL COORDINATION?

Relational Coordination is a mutually reinforcing process of communicating and relating for the purpose of task integration.

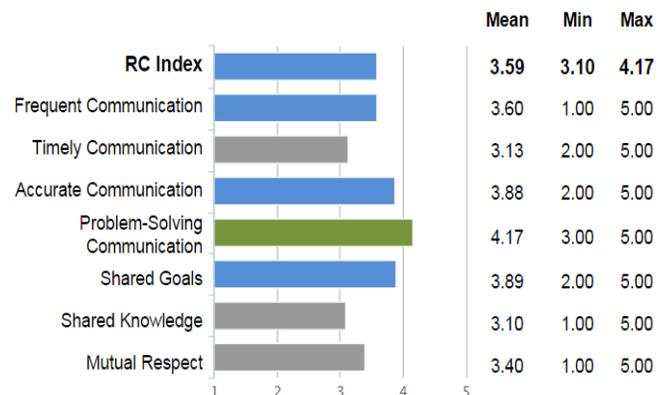
Relational Coordination:

- Drives quality and efficiency,
- Is enabled by effective management practices,
- Matters most for work that is complex, uncertain and time constrained.

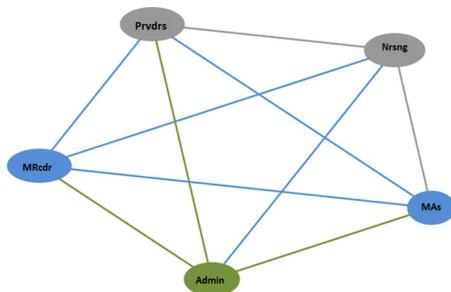


WHAT IS THE RELATIONAL COORDINATION SURVEY 2.0?

The Relational Coordination Survey 2.0 is an actionable diagnostic that provides a comprehensive view of how teams communicate and relate in the course of their daily work. The survey measures the quality of communication and relationship behaviors integral to building cultures of teamwork that enable the creation of healthy, learning organizations. Each survey is customized to focus on a specific work process or client population, tailored to align with the needs of the organization.



WHAT DOES THE RELATIONAL COORDINATION SURVEY 2.0 DO?



- Diagnoses critical communication and relationship patterns that underlie team performance.
- Captures the quality of team performance from the perspective of key stakeholders—patients, caregivers, care teams and leaders.
- Structures working relationships that enable process improvement.
- Monitors team progress and performance over time and between units.

ABOUT RELATIONAL COORDINATION ANALYTICS

Relational Coordination Analytics collaborates with organizations to transform their work processes, organizational culture and performance through positive relationships. Our diagnostic tool identifies concrete, actionable opportunities to improve and strengthen how teams work together in the context of their daily work. For more information, email us at info@rcanalytic.com or call 617-892-8653.

Interprofessional Teamwork Behavior

Please give us some information on how you work with others in the hospital. Remember, in these questions, “team” refers to the other health-care professionals, primarily non-physicians, with who you work to care for patients.

	Never	Rarely	Some- times	Usually	Always	N/A
I check with the other health-care professionals, including non-physicians, involved in caring for my patients to make sure they have all the information they need from me to provide patient care.						
I give my team all the information they need from me to assure a safe transition when a patient is transferred from another unit/facility to my unit.						
I give my team all the information they need from me to assure a safe transition during a patient’s discharge from the hospital.						
I respond to other care providers’ requests (for example, for information, new orders, etc.) without their having to remind me to do so.						
I communicate respectfully with others on my team.						
I communicate with my team about patients in a way that they can understand.						
I address others on my team by name.						
I make an effort to know others on my team as people.						
I am sensitive to cultural differences within my team.						
I make sure my team knows when there are urgent changes to a patient’s plan of care.						
I make sure my team knows the reason for any changes to a patient’s plan of care.						
I make sure my team knows who to contact and how and when to contact them, if problems arise in a specific patient care situation.						
I remain professional when dealing with difficult situations (for example, unexpected changes in a patient’s status, unusual requests from a patient’s family members, etc.)						
I know the roles of the other health-care professionals on my team in providing patient care.						
I ask for input about patient care from all the professionals (for example, nurses, therapists, social workers, etc.) involved with caring for that patient.						
I only ask my teammates to do things that are within their scope of practice or professional expertise.						
I acknowledge what others on my team contribute to caring for patients.						
I encourage my teammates to use their expertise in the care of their patients.						
I encourage my team to express any concerns they may have about a patient’s care.						
I listen to the other members of my team when they have suggestions about a patient’s care.						
I respect unit and hospital rules and protocols around patient care.						
I ask for help from other health-care professionals (nurses, therapists, social workers, etc.) when needed.						
I give others on my team feedback about what they do well.						
I give others on my team feedback about what they do that needs improvement.						
I admit mistakes when I make them.						
I ask for feedback from others on my team about my performance.						
I accept feedback from others on my team about my performance.						

Team Events Non-Technical Skills (TENTS)
 Hohenhaus-Powell-Haskins

Date: _____ Time : _____ Process: _____

Location/Unit: _____ Observer: _____

0= expected but not observed
1= observed but poor
2= observed but marginal
3= observed and acceptable
4= observed and good
NA=not applicable

Element	Behavior	0	1	2	3	4	NA
1a Communication	Sends and receives appropriate information						
1b	Asks questions						
1 c	Utilizes feedback between team members						
1 d	Sends and receives information to/from patient/family						
1 e	Uses appropriate critical language						
1 f	Utilizes teamwork tools						
1 g	Debrief completed						
2 a Leadership	Establishes event leader						
2 b	Verbalizes plan: States intentions, recommendations and timeframes						
2 c	Delegates as appropriate						
2 d	Instructs as appropriate						
3 a Situation Monitoring	Visually scans environment						
3 b	Cross monitors activities; Uses back-up behavior						
3 c	Verbalizes adjustments in plan as changes occur						
4 a Mutual Support/ Assertion	Secures additional resources						
4 b	Supports others						
4 d	Prioritizes appropriately						
4 e	Employs conflict resolution						
4 f	Speaks up/persuades						
5 Overall Teamwork							
6 Overall Leadership							

Any value of "1" or "0" require a narrative comment in the appropriate comment box.

ABIM Teamwork Effectiveness Assessment Module (TEAM)

Overview

The TEAM is meant for use by an individual physician to gather and interpret feedback from their interprofessional “team” with whom they work to care for patients in the hospital. The teamwork assessment is designed for use by providers even in work settings that do not provide formal support or training for interprofessional teamwork.

The teamwork assessment is comprised of four parts/steps:

1. Identification of interprofessional team (see “criteria for identifying interprofessional team”)
2. Self-assessment (see “self-assessment questions”)
3. Assessment by team members (see “rater assessment of hospitalist”)
4. Guided reflection on results with team member(s) (see “guided debrief questions”)

1. Criteria for identifying interprofessional team

Instructions to user: Please use this worksheet to identify your team—the other healthcare professionals who will provide you with feedback. Please choose people with whom you spend a significant proportion of your time caring for patients, and whose work you have the ability to influence (i.e., people who rely on you for information, decisions, and/or opinions).

Requirements:

- You must select a minimum of **15** team members.
- You must select **at least 1 nurse with a leadership role** (e.g., a nurse manager).
- You may not select more than **5** physicians.

You may select:

- The care team on a specific unit or in a specific location (nurse managers, nurses, therapists, pharmacists, social workers, consulting physicians, etc.)
- The care team(s) with whom you work to care for one or more specific patients
- Care-team members from different units in which you work
- Other professionals within the hospital with whom you work regularly and who are qualified to assess your ability to work as part of a patient-care team, including specific individuals from:
 - Nursing managers
 - Bedside/floor nurses
 - Nurse practitioners
 - Therapists (e.g., physical, speech, respiratory, etc.)
 - Social workers
 - Case managers
 - Pharmacists
 - Physicians' assistants
 - Housekeeping and administrative staff (if they are involved in patient care)
 - Other physicians with whom you co-manage patients, or consult re: patient care

You may not select:

- People who do not work at your current institution
 - Residents or other physician trainees under your supervision
 - Patients or patients' family members
-

2. Self-assessment questions

Instructions to user: In all these questions, by "team" we mean the other care providers you work with to provide patient care, including nurses, nurse managers, therapists, social workers, pharmacists, etc., as well as other physicians (but not physician trainees such as residents or medical students).

Interprofessional teamwork behaviors (Never/rarely/sometimes/usually/always)

1. I check with the other non-physician health-care professionals involved in caring for my patients to make sure they have all the information they need from me to provide patient care.
2. I give my team all the information they need from me to assure a safe transition when a patient is transferred from another unit/facility to my unit.
3. I give my team all the information they need from me to assure a safe transition when a patient is transferred from my unit to another unit/facility, or discharged from the hospital.
4. I respond to other care providers' requests (for example, for information, new orders, etc.) without their having to remind me to do so.
5. I communicate respectfully with others on my team.
6. I communicate with my team about patients in a way that they can understand.
7. I address others on my team by name.
8. I make an effort to know others on my team as people.
9. I am sensitive to cultural differences within my team.
10. I make sure my team knows when there are urgent changes to a patient's plan of care.
11. I make sure my team knows the reason for any changes to a patient's plan of care.
12. I make sure my team knows who to contact, and how and when to contact them, if problems arise in a specific patient-care situation.
13. I proactively solicit and integrate input from my team regarding patients' prognoses and the plans and limits of care.
14. I communicate effectively with my team about considerations regarding patients' prognoses and the plans and limits of care.
15. I remain professional when dealing with difficult situations (for example, unexpected changes in a patient's status, unusual requests from a patient's family members, etc.).
16. I know the roles of the other health-care professionals on my team in providing patient care.
17. I ask for input about patient care from all the professionals (for example, nurses, therapists, social workers, etc.) involved with caring for that patient.
18. I only ask my teammates to do things that are within their scope of practice or professional expertise.
19. I acknowledge what others on my team contribute to caring for patients.
20. I encourage my teammates to use their expertise in the care of their patients.
21. I encourage my team to express any concerns they may have about a patient's care.

22. I listen to the other members of my team when they have suggestions about a patient's care.
23. I respect unit and hospital rules and protocols around patient care.
24. I ask for help from other health-care professionals (nurses, therapists, social workers, etc.) when needed.
25. I give others on my team feedback about what they do well.
26. I give others on my team feedback about what they do that needs improvement.
27. I admit mistakes when I make them.
28. I ask for feedback from others on my team about my performance.
29. I accept feedback from others on my team about my performance.

General information (free text)

30. What do you do well to help your team members do their work?
 31. What could you do better to help your team members do their work?
-

3. Rater assessment of physician

Interprofessional teamwork behaviors (Never/rarely/sometimes/usually/always)

1. This physician gives me all the information I need from him/her to provide patient care.
2. This physician gives me all the information I need from him/her to assure a safe transition when a patient is transferred from another unit/facility to my unit.
3. This physician gives me all the information I need from them to assure a safe transition when a patient is transferred from my unit to another unit/facility, or discharged from the hospital.
4. This physician responds to my requests (for example, for information, new orders, etc.) without my having to remind him/her to do so.
5. This physician communicates respectfully with me.
6. This physician communicates with me about patients in a way that I can understand.
7. This physician addresses me by name.
8. This physician makes an effort to know me as a person.
9. This physician is sensitive to cultural differences within the team of care providers.
10. This physician makes sure I know when there are urgent changes to a patient's plan of care.
11. This physician makes sure I know the reason for any changes to a patient's plan of care.
12. This physician makes sure I know who to contact, and how and when to contact them, if problems arise in a specific patient-care situation.
13. This physician proactively solicits and integrates information from me regarding patients' prognoses and the plans and limits of care.
14. This physician communicates effectively with me about considerations regarding patients' prognoses and the plans and limits of care.
15. This physician remains professional when dealing with difficult situations (for example, unexpected changes in a patient's status, unusual requests from a patient's family members, etc.).
16. This physician knows my role in providing patient care.
17. This physician asks for my input about patient care.
18. This physician only asks me to do things that are within my scope of practice or professional expertise.

19. This physician acknowledges what I contribute to caring for patients.
20. This physician encourages me to use my expertise in patient care.
21. This physician encourages me to express any concerns I may have about a patient's care.
22. This physician listens to me when I have suggestions about a patient's care.
23. This physician respects unit and hospital rules and protocols around patient care.
24. This physician asks for help from me when needed.
25. This physician gives me feedback about what I do well.
26. This physician gives me feedback about what I do that needs improvement.
27. This physician admits mistakes when he/she makes them.
28. This physician asks for feedback from me about his/her performance.
29. This physician accepts feedback from me about his/her performance.

General information (free text)

30. What does this physician do well to help you do your work?
 31. What could this physician do better to help you do your work?
 32. Please provide any additional information that you think we should know about how this physician works with you and others on your interprofessional team.
-

4. Guided debrief questions

Instructions to user: Please select at least one other person with whom to review and analyze your feedback report. You should select someone who works in the same hospital and is familiar with your work, but not someone who is directly responsible for managing you or evaluating your performance. You can select someone who is not a physician, and you can select more than one person.

1. Who did you meet with to review your data?
2. Why did you choose this person / these people?
3. What did you learn from reviewing the data with them?
4. What practical next steps will you take to improve where needed?



Team Performance Observation Tool

Date: _____
 Unit/Department: _____
 Team: _____
 Shift: _____

Rating Scale
 Please comment if
 1 or 2.

1 = Very Poor
 2 = Poor
 3 = Acceptable
 4 = Good
 5 = Excellent

1. Team Structure	Rating
a. Assembles a team	
b. Assigns or identifies team members' roles and responsibilities	
c. Holds team members accountable	
d. Includes patients and families as part of the team	
Comments:	
Overall Rating – Team Structure	
2. Communication	Rating
a. Provides brief, clear, specific, and timely information to team members	
b. Seeks information from all available sources	
c. Uses check-backs to verify information that is communicated	
d. Uses SBAR, call-outs, and handoff techniques to communicate effectively with team members	
Comments:	
Overall Rating – Communication	
3. Leadership	Rating
a. Identifies team goals and vision	
b. Uses resources efficiently to maximize team performance	
c. Balances workload within the team	
d. Delegates tasks or assignments, as appropriate	
e. Conducts briefs, huddles, and debriefs	
f. Role models teamwork behaviors	
Comments:	
Overall Rating – Leadership	
4. Situation Monitoring	Rating
a. Monitors the status of the patient	
b. Monitors fellow team members to ensure safety and prevent errors	
c. Monitors the environment for safety and availability of resources (e.g., equipment)	
d. Monitors progress toward the goal and identifies changes that could alter the plan of care	
e. Fosters communication to ensure that team members have a shared mental model	
Comments:	
Overall Rating – Situation Monitoring	
5. Mutual Support	Rating
a. Provides task-related support and assistance	
b. Provides timely and constructive feedback to team members	
c. Effectively advocates for patient safety using the Assertive Statement, Two-Challenge Rule, or CUS	
d. Uses the Two-Challenge Rule or DESC Script to resolve conflict	
Comments:	
Overall Rating – Mutual Support	
TEAM PERFORMANCE RATING	