

Video-Based Simulation: Facilitator Guide

**Situation Monitoring
Shared Mental Model**

TeamSTEPPS Training Curriculum



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SECTION I: INTRODUCTION TO VIDEO-BASED SIMULATION TRAINING

TeamSTEPPS

TeamSTEPPS® is a teamwork system designed for healthcare professionals that is rooted in more than 20 years of research and training experience. It aims to improve healthcare quality and safety by helping teams work more effectively together.




Video-Based Simulation Training

Video-based simulation training is an easy-to-use method for teams to practice applying TeamSTEPPS principles to real scenarios. The goal of this training is for teams to learn to identify TeamSTEPPS principles and tools that promote effective teamwork and then apply these principles in day-to-day clinical work.

The training is composed of four core parts, and one optional part

1. Welcome and Introduction
2. Video Scenario
3. Small Group Debriefing
4. Video Scenario Recap and Summation
5. Followup With Participants (optional)

Advantages of Video-Based Simulation Training

	<p>It can be delivered in 1-hour sessions to conveniently fit into routinely available protected time for professional development.</p>
	<p>No formal training is needed to facilitate or deliver this teamwork training. This guide will help you successfully facilitate this teamwork training.</p>
	<p>It can be delivered in any setting and only requires basic audiovisual capabilities for in-person training or a video conferencing platform for virtual training.</p>

Recommendations for Preparing for This Training

Facilitators should become familiar with this guide and the videos before the training session to maximize the learning experience for participants. There supplementary resources section of this guide includes a [facilitator checklist](#) to help you prepare for the training session. (Accessible materials can be found [here](#).)

Try to include participants from multiple disciplines and roles in the program. Hospital leadership, such as department chairs or executive leadership, can help achieve broad-based participation in the program. Including patients and caregivers can add an important perspective to the exercise.

Facilitators *and* participants should review the [TeamSTEPs Pocket Guide](#) before the session. It provides a handy overview of the program and the learning objectives of this training. Relevant excerpts are included in the Participant Worksheet.

Encouraging Attendance

To strengthen attendance at the session, assess whether it is possible to offer continuing education credit for this session. Your institution's professional education staff may be able to help you obtain CME/CEUⁱ accreditation. In addition, 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 Video-Based Simulation Training

1. 55 minutes of protected time to conduct the training
2. Meeting space with an appropriate amount of room for participants to work in groups of 4-5 during the breakout debriefing discussions OR a secure video conferencing platform with the capability to create breakout rooms. If your internet connection may be unreliable, download video files to your device (computer or storage device) to avoid risk of internet failure during the training session.
3. Facilitator to lead the session who can dedicate 1-2 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 (if presented in person).
5. Three participants at a minimum; the maximum is limited by available space.
6. Participant materials (printed if in person or shared in advance by email if virtual).
7. Facilitator materials (printed if in person).
8. Facilitator-initiated participant follow up emails after the session (optional).

ⁱ CME = continuing medical education; CEU = continuing education units. Other types of credit may be available for various professions.

For information on facilitation and debriefing skills, refer to the list of resources available in the supplemental resources section of this guide.

SECTION II: MODULE OVERVIEW

Situation Monitoring - Shared Mental Model

Learning Objectives:

1. Explain the importance of promoting a shared mental model among the healthcare team, including the patient
2. Describe methods to include patients and family caregivers in the situation monitoring process
3. Recognize that the patient and family caregiver(s) are also members of the healthcare team
4. Describe the application of the components of situation monitoring in a clinical setting (STEP)

TeamSTEPPS Tools and Concepts: shared mental model, STEP

Video Scenario:

A woman is in labor in a birthing center. We see her at the start of the scenario in normal labor. The scenario will progress in “clips” over time as her condition evolves to a stalled second stage of labor, ultimately requiring transfer of the patient to a hospital setting for possible operative delivery. The team will show poor ability to share a mental model among themselves and with the patient and partner of the clinical changes and spotty recognition of the clinical change. The team will not keep the patient up to date about her clinical situation.

Debrief Focus:

The scenario illustrates a breakdown of situational awareness within the clinical team and between the clinical team and the patient and her partner. What behaviors or tools could have helped to avoid this outcome? Why might this situation arise? How do clinicians recognize information to share with patients and how can they share it?

Optional Topics to Explore:

How have you navigated similar scenarios in your own clinical experience? How do you respect the patient’s preferences and desires and the clinical priorities at the same time?

Can you discuss clinical events openly with other clinicians and patients at the same time?
 How do you decide what information is to be shared with the patient, partner, or both?
 How could this scenario have been improved by the use of the TeamSTEPPS “STEP” monitoring framework that focuses on the status of the patient, team members, the environment, and progress toward the goal?

SECTION III: FACILITATOR GUIDE

Facilitator Guide Overview



This training module is primarily designed to be used with a series of prerecorded videos to introduce the session activities, in addition to the video scenarios. However, except for the “Video Scenario” and the “Video Scenario Recap” segments that must be used, the facilitator can choose to either use the prerecorded videos to introduce the segments or narrate those introductions using the Content Outlines provided for each segment.





Each module has four mandatory parts and one optional part:

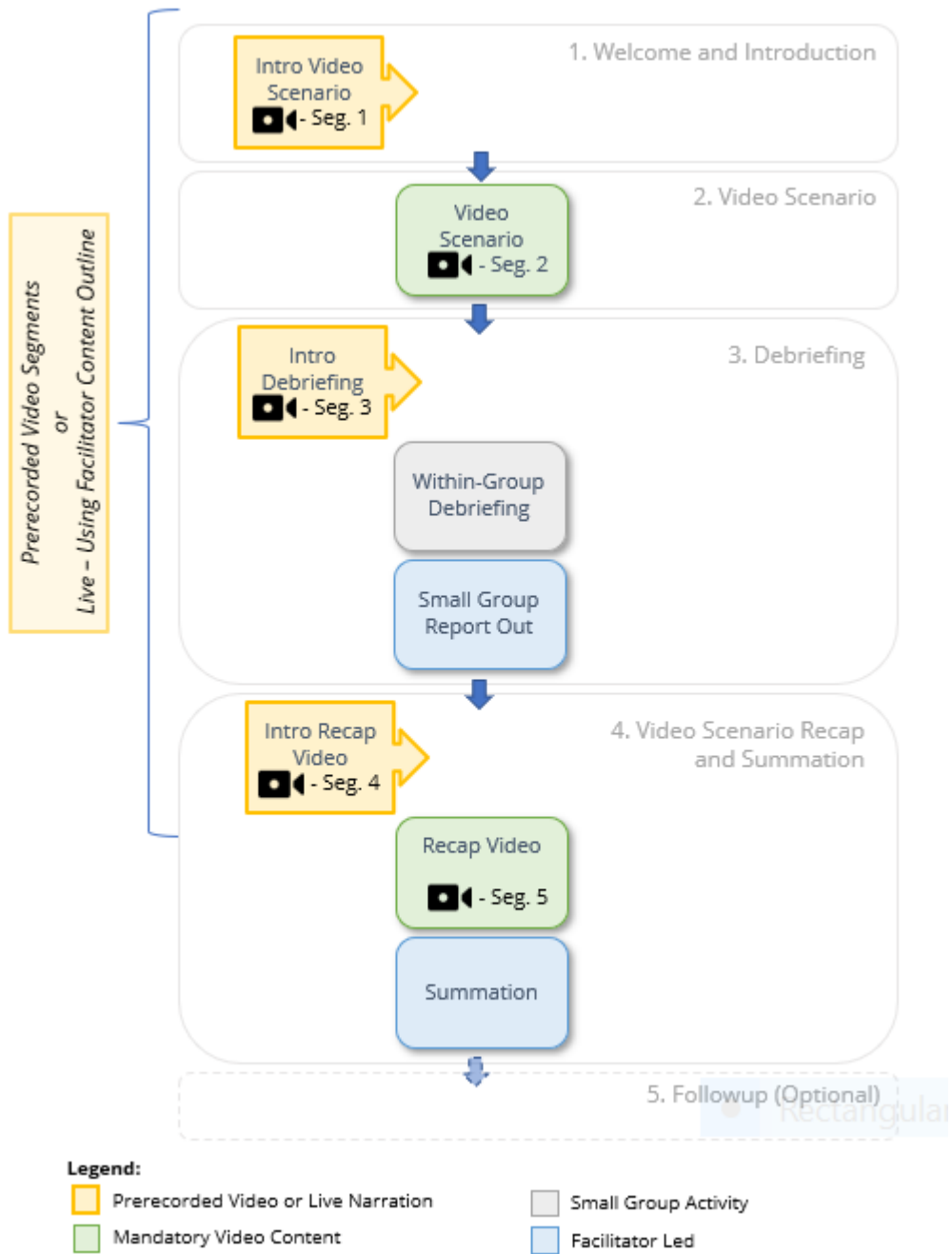
1. Welcome and Introduction
2. Video Scenario
3. Small Group Debriefing
4. Video Scenario Recap and Summation
5. Follow up With Participants (optional)

The training session is composed of several video segments and several group activities as shown on the visual representation below.

Legend of the icons used in the activities:

	Used when the facilitator needs to narrate the activity. Narration examples are provided.
	Used when a prerecorded video must be used. <i>Selecting the play icon will launch the video.</i>

 OR 	Used when the facilitator can choose to either use the pre-recorded video (<i>selecting the link will launch the video</i>) or narrate the activity themselves (<i>selecting the link will bring you to the Content Outline for the facilitator</i>), optionally using included slides.
	Used when the facilitator has to pause to let participants ask questions or complete an activity.
	Used when the facilitator has to check in or interact with participants.






Visual representation of the training module




Note: Each video segment is provided as a separate video file. A compiled video of all the segments is also available. If you decide to use the compiled video, refer to the Facilitator Worksheet to identify time stamps for each segment.

Training Module Activities



1) Welcome and Introduction (~5 minutes)




	<p>Welcome participants. Play the video - segment 1 (select here)</p>
<p>OR</p>	<p>(if virtual, share screen too).</p>
	<p>or Discuss importance of TeamSTEPPS video-based scenario team training and the learning objectives and agenda for the session (select here to access a content outline).</p>
	<p>Pause and answer questions participants have on the learning objectives or agenda.</p>

2) Video Scenario (~5 minutes)






	<p>(If in person) Hand out participant worksheets. (If virtual) Share the participant worksheet via email or in the chat.</p>
	<p>Play the video scenario - segment 2 (select here) (if virtual, share screen too).</p>
	<p>Pause for participants to finish notes (on the worksheet or other medium).</p>

3) Debriefing (~30 minutes)

	<p>Introduce the debriefing session. Play the video - segment 3 (select here)</p>
<p>OR</p>	<p>(if virtual, share screen too).</p>
	<p>or</p>

	<p>Introduce the debriefing small group discussions (select here to access a Content outline).</p>
	<p>Break into groups (in person or in virtual breakout rooms) for 20 minutes of discussion.</p> <p>Note: Groups can be preassigned when possible. We suggest 4-5 interdisciplinary participants per group with a range of seniority and patients and caregivers when possible.</p> <p>Refer to the facilitator worksheet for instructions.</p> <p>As the facilitator you will monitor the discussions in small groups as a roving observer and time-keeper.</p> <p><i>(if in person)</i> walk around, pausing at each group.</p> <p><i>(If virtual)</i> go into each group's breakout room at least once.</p> <p>Keep in mind that the small groups should think about the scenario through the lens of TeamSTEPPS principles. Be prepared to help groups that have fallen silent or strayed into unrelated discussions. Consider guiding them: (1) Ask them to describe their own experiences related to the scenario, (2) Direct them to the optional topics highlighted earlier, and (3) Ask the participants to review the Pocket Guide excerpt in their Participant Worksheet to see how its content relates to the scenario.</p>
	<p>Remind participants when it's time to begin discussing key takeaways and that they will report out to the larger group. Ask everyone to wrap up their discussions.</p> <p><i>"Please finish your discussions and make sure that you have someone from your group ready to present the key takeaways"</i> (orally or in chat if virtual).</p>
	<p>Small Group Sharing - Call on the spokesperson from each small group to share their group's key takeaways.</p> <p>If you have a large group, consider having groups put their key takeaways on a whiteboard or sticky notes (or in chat if virtual); then the facilitator can pick some or all to review with the group during the Summation.</p> <p><i>"Let's have each small group share their key takeaways and how TeamSTEPPS principles and tools could have been used to improve communication in the video scenario."</i></p>

4) Video Scenario Recap and Summation (~15 minutes)

 OR 	<p>Play the video - segment 4 (select here) <i>(if virtual, share screen too).</i></p> <p>or</p> <p>Introduce the Video Scenario Recap (select here to access a Content outline).</p>
	<p>Play the Video Scenario Recap - segment 5 (select here).</p> <p><i>"We will now watch an example of the healthcare team working together and exemplifying good teamwork and communication. Consider how the application of the TeamSTEPPS skill improves communication and patient care."</i></p>
	<p>Summation - draw the conversation to a close by summarizing common themes reported out by the small groups and highlighting how TeamSTEPPS principles and tools could have improved communication. The facilitator must keep the group focused on the following task:</p> <p><i>"Please think of one or two changes that you could work on beginning today that would make you a better communicator with your teammates using a shared mental model and STEP."</i></p>
	<p>Provide closing remarks.</p> <p><i>"Thank you for participating in today's training. (Optional) I will touch base by email soon to share the key takeaways we heard today and ask you to think about what today's lessons have meant in your work between now and then."</i></p>

5) Follow up With Participants (optional)

After the session, you may want to follow up with the participants to reinforce what they learned. Consider sending an email within 2 weeks after the session revisiting the key takeaways and TeamSTEPPS principles/tools discussed during the wrap up discussion (template email is available in the supplemental resources section of this guide).

SUPPLEMENTARY RESOURCES

Facilitator Preparation Checklist

- **Read through the Facilitator Guide** and TeamSTEPPS Pocket Guide and watch the videos.
- **Determine the best format for training (in person or virtual).** There are benefits to both formats. Consider the format of other well-attended meetings in your department, as well as participant access to and comfort-level with video conferencing technology.
- **Schedule the session.** Grand rounds or continuing education conferences are good opportunities. A mix of clinical backgrounds and experiences is ideal but not necessary.

(If the session is in person)

- **Book a room** that is an appropriate size with audiovisual equipment (can play a video with audio from a computer or speakers) and seating for your group.
- **If you might not have access to a stable Internet connection during the training session, download the videos** from the link in this Guide to your computer or flash drive. (Note: they are large files and may take time to download.)
- **Test the audiovisual equipment and video** the day before the session.

(If the session is virtual, obtain expert support for use of the video conferencing platform if needed.)


- **Ensure participants have access to the video conferencing platform.**
- **Create a meeting invite** on the video conferencing platform.
- **Test the video link, screen sharing, and creating breakout rooms** prior to the session
- **Consider ways to increase participation**, such as offering continuing education credits or snacks.
- **Constitute the groups for the debriefing (Optional).** Assign 4-5 people per group. A mix of different members of the healthcare 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. If the session is virtual, you can create breakout room groups in advance, or you may assign a second person to create and assign people to the breakout rooms during the introductory section.
- **Prepare materials.** Print these for in-person sessions or send them in advance via email for virtual sessions:
 - Facilitator materials
 - Participant materials - 1 per participant
 - [Participant Worksheet](#)
 - [Pocket Guide](#)

Return to [Recommendations for Preparing for This Training](#)

Facilitator Content Guide: Bullet Points for Narration by an Onsite Facilitator


[Slides for this content](#)

1) Welcome and Introduction

	<p>Background on TeamSTEPPS program:</p> <ul style="list-style-type: none"> • History • Purpose • Importance of teamwork and communication in healthcare quality and safety <p>Describe simulation video scenario.</p> <p>Recommendations for observing team interactions. Assume team members are capable and well intentioned: focus on their behavior, not their character.</p> <ul style="list-style-type: none"> • Are team members sharing information effectively with each other? • Is information shared with the patient and her partner and are their priorities recognized? <p>Orient participants to the Participant Worksheet:</p> <ul style="list-style-type: none"> • Notes should be taken during video. <p>Prepare participants for the small group discussions to follow:</p> <ul style="list-style-type: none"> • Expectation that all participants contribute to the discussion.
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Return to [Facilitator Guide \(Welcome and Introduction\)](#)


3) Debriefing

	<p>Intro to the Debriefing session</p> <p>Ground rules for small groups</p> <p>Assume that the individuals portrayed in the scenario are intelligent, capable and caring professionals who are doing their best</p>
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	<ul style="list-style-type: none"> • <i>This statement encourages respectful discussion, curiosity, and open dialogue among participants. You can learn more about it here.</i> <p>Begin by reviewing notes and formulating thoughts.</p> <p>Spend specified time discussing the following:</p> <ul style="list-style-type: none"> • What was your overall impression of the video? What went well? Where did things start to go “less well”? • How could the team have included the patient and her partner in the situation monitoring process and created a shared mental model? What information should they have shared with the patient and her partner? • Do you think the nurse and the midwife were on the same page? • How could the team have used the STEP framework to improve their monitoring of the situation? <p>Rotate role of discussion leader for each topic, by name alphabetically or by seating position.</p> <p>Allow time after discussing these questions for the group to identify priority behaviors and skills for daily practice to share with large group.</p>
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Return to [Facilitator Guide \(Debriefing\)](#)

4) Video Scenario Recap and Summation

	<p>Recap video shows good use of TeamSTEPPS tools.</p> <p>Consider content of recap video and small group discussion key takeaways during summation.</p> <p>Goal of summation is to identify specific ways for each participant to improve teamwork skills in their own work.</p>
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Return to [Facilitator Guide \(Video Scenario Recap and Summation\)](#)

Facilitator Worksheet

We recommend keeping this agenda close by when conducting the session. The facilitator should keep the session running on time.

Learning Objectives:

1. Explain the importance of promoting a shared mental model among the healthcare team, including the patient.
2. Describe methods to include patients and family caregivers in the situation monitoring process.
3. Recognize that the patient and family caregiver(s) are also members of the healthcare team.
4. Describe the application of the components of situation monitoring in a clinical setting (STEP).

(hh:mm)	<i>Facilitator using prerecorded narratives</i>	<i>Facilitator narrating themselves (refer to Facilitator Content Guide and related slides)</i>
Welcome and Introduction (5 min)		
00:00	Facilitator welcome Play the prerecorded introduction - segment 1	Facilitator welcome Why we are here Objectives of the session Overview *Facilitator: Distribute agenda* Provide Video Scenario instructions
00:05	Questions from participants?	
Video Scenario (5 min)		
00:05	*Facilitator: Distribute Participant Worksheet* Play the Video scenario - segment 2 Provide time to participants to take notes	

Debriefing (30 min)		
00:10	Play the prerecorded debriefing introduction - segment 3	Provide debriefing instructions
00:15	<p>Groups break-out and discuss:</p> <ol style="list-style-type: none"> 1. <i>What was your overall impression of the video? What went well? Where did things start to go "less well"?</i> 2. <i>How could the team have included the patient and her partner in the situation monitoring process and created a shared mental model? What information should they have shared with the patient and her partner?</i> 3. <i>Do you think the nurse and the midwife were on the same page?</i> 4. <i>How could the team have used the STEP framework to improve their monitoring of the situation?</i> <p>Facilitator monitors group discussions, assists as needed.</p>	
00:35	Small group sharing	
Video Scenario Recap and Summation (15 min)		
00:40	Play the prerecorded intro to Recap Video - segment 4	Introduce the Recap Video
00:42	Play Recap Video - segment 5	
00:45	Summation	
00:55	Session concludes	

If you use the [full-length video](#), below are timestamp references for each segment:

Segment	Timestamp start (m:ss)	Timestamp end (m:ss)	Description
1	0:00	3:36	Intro to Video Scenario
2	3:37	8:04	Video Scenario
3	8:06	10:22	Intro to Debriefing
4	10:24	11:04	Intro to Recap Video and Summation
5	11:06	end	Recap Video

Participant Worksheet

Learning objectives:

1. Explain the importance of promoting a shared mental model among the healthcare team, including the patient.
2. Describe methods to include patients and family caregivers in the situation monitoring process.
3. Recognize that the patient and family caregiver(s) are also members of the healthcare team.
4. Describe the application of the components of situation monitoring in a clinical setting (STEP).

Welcome and Introduction	
5 minutes	Welcome & Why we are here Goals and Overview Video Scenario instructions
Video Scenario	
5 minutes	Video Scenario
Debriefing	
30 minutes	Individual reflections Small group discussions Small group sharing - Key takeaways reported from each group
Video Scenario Recap and Summation	
15 minutes	Video Scenario Recap Summation Closing

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 *(for your notes)*

Are team members sharing information effectively with each other?

Is information shared with the patient and her partner and are their priorities recognized?

Small Group Discussion

Recommended Total Duration: ~20 minutes

Share General reactions

~2 minutes

- What are everyone's initial reactions to the video scenario?
- What went well? Where did things start to go "less well"?

Discuss patients and caregivers as part of the healthcare team

~3 minutes

- How could the team have included the patient and her partner in the situation monitoring process and created a shared mental model? What information should they have shared with the patient and her partner?

Discuss tactics for shared mental model

~3 minutes

- Do you think the nurse and the midwife were on the same page?

Discuss STEP

~4 minutes

- How could the team have used the STEP framework that focuses on the Status of the patient, Team members, the Environment, and Progress toward the goal to improve their monitoring of the situation?

Prepare key takeaways - to be reported out by a member of each small group

~8 minutes

- What are the most important takeaways and TeamSTEPPS tools that you discussed?
- How do you plan to apply these in your daily work?

Optional topics to explore:

How have you navigated similar scenarios in your own clinical experience? How do you respect the patient's preferences and desires and the clinical priorities at the same time?

Can you discuss clinical events openly with other clinicians and patients at the same time?

How do you decide what information is to be shared with the patient, partner, or both? What is the role of the patient versus the family caregiver? How does that impact how you include them in the team?

Key TeamSTEPs Tools Related to This Module

Situation Monitoring is one of the four essential skills for safe, effective, and patient-centered care.



Situation monitoring is the process of actively scanning behaviors and actions to assess elements of the situation or environment. Individual team members can work to acquire, practice, and improve this skill.

Situation monitoring is a continuous process composed of three elements:

- **Situation monitoring** (an individual skill): The process of continually scanning and assessing a situation to gain and maintain an understanding of what’s going on around you.
- **Situation awareness** (an individual outcome): The state of “knowing what’s going on around you.” It assumes the continuous monitoring of the:
 - Status of the patient.
 - Status of other team members.
 - Status of the environment.
 - Status of the progress toward the goal.
- **Shared mental models** (a team outcome): Results from each team member maintaining situation awareness and communicating to ensure that all team members are “on the same page.” Shared mental models enable the team to anticipate and predict each other’s needs; identify changes in the team, task, or teammates; and adjust the course of action or strategies as needed.

STEP



STEP is a mnemonic tool that can help individuals monitor critical elements of a situation and overall environment:

- **Status of the patient:** Patient history, vital signs, medications, physical exam, plan of care, psychosocial issues, patient preferences or concerns
- **Team members:** Fatigue, workload, task performance, skill, stress level
- **Environment:** Facility information, administrative information, human resources, triage acuity, equipment
- **Progress toward the goal:** Status of team's patient(s), established goals of team, tasks/actions of team, plan still appropriate

Facilitator Follow up Sample Email

Send within approximately 2 weeks after the session. Customize the portions as indicated.

Dear [Participants/Colleagues/Team],

Thank you for participating in the TeamSTEPPS video simulation training session. I appreciate that you took the time out of your busy schedule to join the training.

I trust that you have been able to use some of the strategies we learned in the training session. The objectives for the session were to understand the key tactics for shared mental models and to apply these in our day-to-day clinical work.

The common themes from our session were [summarize key takeaways from the small group discussions].

Please take time to consider whether you have observed any of these strategies used since our session. Have you been able to apply these tactics to improve patient care? Think about whether you have been able to draw on the training and apply the strategies in clinical practice.

Your feedback on this training is valuable.

Thank you,

[your name]

Resources for Developing Facilitator 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

Fee required 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 to hone their craft.

Estimated time commitment: Varies

Available in print or ebook through Amazon, Springer, and several others.

Informational digital resources

Free Demian Szyld, M.D., Ed.M. is a practicing emergency medicine physician at Brigham and Women's Hospital and 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, ways to create a psychologically safe learning environment, and the subtle nuances of debriefing language.

Estimated time commitment: 50 mins

[Structured Simulation Debriefings: An Interview With Demian Szylid](#)

Free

The University of Washington provides an online tutorial for training new facilitators to deliver simulation-based education. This lesson provides a basic overview of debriefing, considerations in debriefing, and 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 to gain access. Registration is free of charge.

Estimated time commitment: 30-40 mins

<https://collaborate.uw.edu/course/sim-104-briefing-and-debriefing-the-key-to-learning-in-simulation/>

Online courses

Fee required

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

<https://www.healthysimulation.com/medical-simulation/organizations/simulation-canada/>

In-person courses and fellowship programs

Fee required

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

<https://www.ssih.org/>