



TeamSTEPPS 2.0 Course Management Guide

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Attribution

The graphic design within the TeamSTEPPS course materials is inspired by the John Kotter (2006) book *Our Iceberg is Melting, Changing and Succeeding Under Adverse Conditions*. This book illustrates Kotter's Eight Stages of Change, a proposed set of steps to initiate and sustain change in an organization, through the story of a penguin colony faced with a melting iceberg. User experience and feedback on this book sparked the graphic design concept for the Instructor Manual.



Introduction

The TeamSTEPPS 2.0 Course Management Guide provides Master Trainers with a resource for understanding and preparing to provide TeamSTEPPS training. This Guide presents an overview of the TeamSTEPPS course and course options, including a description of the course materials; information about how to use the course materials; and information about conducting the course, including course preparation and course delivery. Specifically, this Guide will prepare users to:

- List and distinguish between the TeamSTEPPS course options and their respective uses;
- Select the TeamSTEPPS course option most appropriate for the instructional audience;
- Identify tasks required to prepare for successful course delivery;
- Identify tasks required to successfully deliver the course; and
- Identify media and other TeamSTEPPS resources that can be used to supplement and/or customize the course.

TeamSTEPPS Master Trainers are strongly encouraged to use this Guide to prepare for providing TeamSTEPPS instruction. Master Trainers will benefit from guidance about the course options, information about course customization, and checklists to use in preparing for, delivering, and conducting activities after training. This information is useful not only to new Master Trainers, but also to experienced Master Trainers, who are encouraged to review the information in this document periodically as a refresher.

The TeamSTEPPS 2.0 Course Management Guide is organized into four main sections, including appendixes. Each section is described briefly below.

- **Overview of TeamSTEPPS Training:** This section provides a brief overview of TeamSTEPPS and describes the TeamSTEPPS course options and their intended uses. In addition, information and resources regarding customization of content are provided.
- **Course Preparation:** This section discusses considerations and specific steps for preparing to provide TeamSTEPPS instruction.
- **Course Delivery:** This section presents considerations and specific steps for delivering a TeamSTEPPS course. Information presented in this section is specific to activities to complete during and after course delivery.
- **Appendixes:** The final section of this document provides appendixes that include a sample course agenda, matrix of available TeamSTEPPS video vignettes, and a list of other TeamSTEPPS versions and modules.

Overview of TeamSTEPPS Training

Background

TeamSTEPPS is an evidence-based, comprehensive teamwork training system designed to improve quality and safety in health care and is rooted in more than three decades of research in high-stress, high-risk industries, such as military aviation. TeamSTEPPS is based on a



framework of four teachable-learnable core teamwork skills: communication, leadership, situation monitoring, and mutual support. Team-related knowledge, as well as specific tools and strategies to support the core skills, are delivered to an organization through a customizable course. The course is delivered to individuals using a train-the-trainer model, resulting in instructors (i.e., Master Trainers) who in turn train and coach staff in targeted work units.

The TeamSTEPPS initiative was originally developed by the Department of Defense Patient Safety Program, in collaboration with the Agency for Healthcare Research and Quality (AHRQ). TeamSTEPPS was released by AHRQ to the public in 2006. In 2007, AHRQ launched the National Implementation Program, which offers the Master Trainer Course at regional training centers across the United States. In addition, AHRQ maintains TeamSTEPPS information and materials on its Web site at [TeamSTEPPS AHRQ](#).

TeamSTEPPS 2.0 is an update of the original TeamSTEPPS curriculum, based on emerging evidence, lessons learned, and expanded patient safety topics since the original curriculum's release. In addition, TeamSTEPPS 2.0 offers Master Trainers resources that were not available in the original curriculum. These include instructor outlines for each instructional module; links to other resources, where appropriate; and clearer information about facilitating exercises and activities with training participants.

Key Terms

To ensure understanding of the information provided in the Course Management Guide, a list of frequently used terms is provided and further defined.

- **Master Trainer** – A trainer knowledgeable about TeamSTEPPS tools and strategies and their application to improve patient safety and the delivery of safe and efficient care. Master Trainers also know how to perform site assessments and determine performance gaps; coordinate implementing TeamSTEPPS initiatives across a number of organizations; and prepare, train, and provide process consultation to the unit, department, or organization implementing teamwork.
- **Train-the-Trainer** – Refers to the approach in which the TeamSTEPPS Master Trainer Course provides training to a group of participants, who then conduct training of staff at the unit, department, or facility level.
- **Train-the-Participant** – Refers to the approach in which TeamSTEPPS trainers train participants/staff of a particular workspace.

Course Options and Suggested Uses

The customizable TeamSTEPPS curriculum is composed of three major training products, which provide various training options. Which product to use will be determined by the training needs and requirements of the target participants. Each training option is described below.

- The **Master Trainer Course** refers to a 2-day course that uses a train-the-trainer approach to educate participants in the TeamSTEPPS Fundamentals content, provide them with



resources for training others, and ensure that they gain the knowledge and training required to implement and coach the behaviors needed to achieve positive results. This course option is taught by – and produces – Master Trainers. Trainers should represent multiple disciplines, and where appropriate, include at least one physician and one nurse.

- The **Train-the-Participant** course options are those designed to teach TeamSTEPPS Fundamentals to participants who are not intended to further train others. Two options for educating participants are available, as described below.
 - If participants *are* direct providers of care, the **TeamSTEPPS Fundamentals Course** is used for instruction. The Fundamentals Course is the TeamSTEPPS core platform, adaptable to any service or aspect of health care. It can be taught in 4 to 6 hours.
 - If participants *are not* providers of direct, hands-on care, the **TeamSTEPPS Essentials Course** is used. The Essentials Course provides an abbreviated version of the Fundamentals content. This version is useful for staff who do not engage in the direct delivery of care, but who contribute essential information with an impact on the ongoing delivery of safe care. This course can be taught in 2 hours. It is important to note that the TeamSTEPPS Essentials Course is not interchangeable with the Fundamentals Course, nor is the Essentials Course a substitute for the basic education and skill practice offered through the Fundamentals Course.

Course Options and Their Content

In the descriptions above, information about the use of the TeamSTEPPS course options was discussed. Below, details about the content associated with each option are presented.

TeamSTEPPS Master Trainer Course

Using a train-the-trainer model, the Master Trainer Course is a 2-day composition of instruction and interactive classroom workshops designed to create a group of instructors for a department or facility. This course provides participants with the skills needed to teach TeamSTEPPS content, as well as information and resources to plan, manage, and sustain a TeamSTEPPS initiative. The 2-day course includes the following:



- **Day 1** is designed to deliver TeamSTEPPS Fundamentals. The Fundamentals include 7 instructional modules, as follows:
 - Module 1 – Introduction
 - Module 2 – Team Structure
 - Module 3 – Communication
 - Module 4 – Leading Teams
 - Module 5 – Situation Monitoring
 - Module 6 – Mutual Support
 - Module 7 – Summary: Pulling It All Together
- **Day 2**, also known as the Trainer/Coach Course, is designed to provide the tools, strategies, and skill practice that address culture change and change management; prepare TeamSTEPPS coaches; measure the effect of a TeamSTEPPS initiative; and conduct implementation planning. Implementation planning involves work toward completing a 10-step Action Plan that is designed to identify problems, establish goals and specific aims, determine team-sensitive metrics, and monitor and analyze data to determine the impact of behaviors on process and outcomes. Day 2 modules include:
 - Module 8 - Change Management: How to Achieve a Culture of Safety
 - Module 9 - Coaching Workshop
 - Module 10 – Measurement
 - Module 11 - Implementation Planning Workshop
- **(Optional) Day 3** is designed to provide participants with an opportunity to practice teaching preassigned modules from TeamSTEPPS Fundamentals. This optional Day 3 is monitored by at least one instructor (Master Trainer) who provides coaching and consultation to each participant. The length of Day 3 depends on the number of participants teaching. Participants typically teach for 20 minutes and then receive 2 minutes of peer feedback and coaching and 2 minutes of coaching/consultation from the instructor. The recommended class size for the practice teaching sessions is eight participants per assigned Master Trainer. Information and materials about Day 3 are included in the Instructor Manual in Module 12 – Practice Teaching Session.

A sample agenda for the Master Trainer Course, which can be modified as needed, is provided in Appendix A. The content and materials to conduct the course are available in the Instructor Manual and online at [TeamSTEPPS Fundamental Tools](#). (**Note:** This link includes both the Fundamentals Course modules and the Trainer/Coach modules that make up the Master Trainer Course.)



What does it mean to be a Master Trainer?

Individuals who complete the Master Trainer Course are themselves considered Master Trainers. They may deliver the Master Trainer Course to other individuals, thereby creating a new cadre of Master Trainers. Similarly, Master Trainers may also provide train-the-participant instruction. However, Master Trainers must accept a role that extends beyond the course instruction. That is, Master Trainers are also change agents within their organization, and as such play a critical role in planning the implementation of, implementing, and sustaining TeamSTEPPS. Master Trainers typically also serve as coaches to ensure that the new teamwork skills are properly used and reinforced. However, additional individuals may require selection and training specifically as coaches to provide sufficient coverage of this role in the work unit or organization. More information about instructing TeamSTEPPS is provided in the Course Preparation section of this document.

TeamSTEPPS Train-the-Participant

As noted in the Course Options and Suggested Uses section above, there are two options for providing train-the-participant education. The first option is to use the **Fundamentals Course**, when participants are direct providers of care. This course is a 4- to 6-hour interactive workshop that introduces the participant to the Fundamentals content that includes tools and strategies specifically designed to improve teamwork outcomes. The Fundamentals are organized into seven instructional modules, as follows:

- Module 1 – Introduction
- Module 2 – Team Structure
- Module 3 – Communication
- Module 4 – Leading Teams
- Module 5 – Situation Monitoring
- Module 6 – Mutual Support
- Module 7 – Summary: Pulling It All Together

The content and materials to deliver the TeamSTEPPS Fundamentals are available in the Instructor Manual and online at [Instructor Manual](#). (**Note:** Only Modules 1-7 are considered part of the Fundamentals Course.)

Although little is known with regard to team training and alternate training schedules or “dosing,” the concept is popular specifically where blocking large segments of time for education is a challenge or threat to the safe delivery of care. Below are two alternatives to one-time training:



- Delivering the 7 modules in 2 separate sessions:
 - Session 1 provides Modules 1-4 (Introduction, Team Structure, Communication, and Leading Teams); and
 - Session 2 provides Modules 5-7 (Situation Monitoring, Mutual Support, Summary, and the optional Practice Teaching Session).
- Delivering one module a week for 7 consecutive weeks.

The second option for providing train-the-participant education is to use the **TeamSTEPPS Essentials Course**, when participants are not direct providers of care. The Essentials Course is a condensed, modified version of TeamSTEPPS Fundamentals. The Essentials Course delivers, in a 1- to 2-hour interactive workshop, the core teamwork concepts and specific tools and strategies known to improve communication and teamwork and reduce the chance of medical error. To achieve the full safety effect of teamwork, TeamSTEPPS Essentials **is not interchangeable** with Fundamentals **nor is it designed to serve as a substitute** for the basic education and skill practice offered through Fundamentals.

The content to deliver the TeamSTEPPS Essentials Course is available online at [TeamSTEPPS Essentials](#).

Note: Regardless of whether the Fundamentals Course or Essentials Course is used, participants should be excused from all duties during class attendance to preclude disruptions and scheduling problems and to maximize learning.

A summary of the TeamSTEPPS course options described above, along with associated course materials, suggested scheduling, and recommended frequency of instruction, is provided in Table 1.



Table 1: TeamSTEPPS Course Options

<i>Course Option & Description: Master Trainer Course: TeamSTEPPS Fundamentals and Trainer/Coach Course</i>				
Target Audience	Class Size / Composition	Course Materials	Scheduling	Frequency
The TeamSTEPPS Master Trainer Course is designed to prepare individuals to serve as TeamSTEPPS Master Trainers. This course option is for health care team training instructors and coaches who will deliver the TeamSTEPPS curriculum.	Class size should be determined such that the number of participants per physician-nurse pair is sufficient to maximize interaction, learning, and teaching effectiveness. All classes should be interdisciplinary and cross-functional.	Instructor Manual, slides, and Pocket Guide. The Instructor Manual contains TeamSTEPPS Fundamentals, Change Management, Coaching, Measurement, and Implementation Planning workshops. Supplemental materials include practical exercises, video vignettes, and evidence base references.	Classroom instruction for TeamSTEPPS is designed to be conducted in 2 consecutive days. However, the course should be scheduled in a way that meets your facility's or organization's needs. To preclude disruptions and scheduling problems, participants should be excused from all duties during course attendance.	An initial training is essential to create the instructor/coach cadre (i.e., Master Trainers). Thereafter, the course is held as necessary to replace instructors. The TeamSTEPPS Master Trainer Course is mandatory for the initial instructor and coaching team. Concessions can be and are made for individuals joining the team thereafter. Concessions depend on individuals' experience with the material and with the process of coaching and their intended role.
<i>Course Option & Description: Train-the-Participant: TeamSTEPPS Fundamentals</i>				
Target Audience	Class Size / Composition	Course Materials	Scheduling	Frequency
The TeamSTEPPS Fundamentals Course is designed for direct patient caregivers.	Class size should be determined such that the number of participants allows instructors to maximize interaction, learning, and teaching effectiveness. All classes should be interdisciplinary and cross-functional to include physicians, nurses, technicians, etc.	Facility/organization members determine the course materials needed to train staff onsite. If handouts are used, a common choice is to bind a set of course slides, printed 3 to a page, notes view. Supplemental materials can include the Pocket Guide, handouts/worksheets to facilitate course exercises, and evidence base references.	Classroom instruction for TeamSTEPPS Fundamentals is designed as a 4- to 6-hour block for individuals who provide direct patient care. The time block variability depends on the time allocated to practice and interact.	It is strongly recommended that TeamSTEPPS Fundamentals be mandatory for all direct patient caregivers. All new employees, including residents, should receive this training as part of orientation. Coaching and reinforcement should be provided to all staff on a daily basis to maximize team functioning. Formal refresher training should be provided annually with ad hoc refresher training provided during in-services, etc.
<i>Course Option & Description: Train-the-Participant: TeamSTEPPS Essentials</i>				
Target Audience	Class Size / Composition	Course Materials	Scheduling	Frequency
The TeamSTEPPS Essentials Course is designed for nonclinical staff who provide a supporting role in planning or executing patient care.	Class size should remain at a manageable number that allows for interaction and discussion.	The Pocket Guide is used to reinforce learning and support discussions.	Classroom instruction for TeamSTEPPS Essentials should be conducted in one 1- to 2-hour block for staff.	It is strongly recommended that TeamSTEPPS Essentials be mandatory for department staff who do not provide direct care but are vital to care planning or execution (e.g., laboratory, dietary, environmental services, administration).



Customizing Content

The TeamSTEPPS framework has been extensively researched, piloted, and validated; therefore, it is recommended that the model remain intact. However, all courses are customizable in order to target the focus of your audience. The materials provided can be:

- Used as provided;
- Customized with supplemental and interchangeable TeamSTEPPS content and examples (provided); or
- Customized with your own content and examples.

Sources of available materials to customize your training include, but are not limited to, the following items.

TeamSTEPPS Specialty Scenarios: As part of the TeamSTEPPS curriculum, the TeamSTEPPS materials include 131 specialty scenarios that address 10 domains (e.g., ambulatory care, neonatal ICU, OR, combat care). These can be used to substitute scenarios within the training content, promote discussion, or develop exercises or simulation scenarios to model and provide opportunities to practice TeamSTEPPS tools and strategies.

TeamSTEPPS Video Vignettes: Within the TeamSTEPPS curriculum, videos have been integrated to demonstrate the use of (or opportunities to use) TeamSTEPPS tools and strategies. Additional TeamSTEPPS videos are available online, should you wish to interchange videos. A video matrix is provided in Appendix B.

Other TeamSTEPPS Modules and Versions: Additional modules and versions of TeamSTEPPS have been developed and released by AHRQ. These can be found on AHRQ's website at [Additional Materials](#). These serve as sources for additional scenarios, examples, and videos, which you may wish to use to customize your TeamSTEPPS training. Relevant modules and versions of TeamSTEPPS are noted in the Instructor Guide for each module within the Train-the-Trainer/Master Trainer Course. (For more information about the Instructor Guides, please see the "Course Materials" discussion on page 9 of this document.) A list of available TeamSTEPPS modules and versions, along with brief descriptions of each, is provided in Appendix C.

***Note:** If you choose to integrate specific examples or cases from your own institution, it is incumbent upon those customizing presentations to scrub each example or case of its identifying details (e.g., without changing the impact of a case, a male can become a female, a child an adult, an adult a child). If those details cannot be altered without an impact on the case, consider its use versus choosing another case. Consider the impact of open discussions on the caregivers involved in the case. If the decision is to keep the case, confidentiality and compliance with*



HIPAA regulations and protocol rule all discussions. All cases discussed should be closed cases. When in doubt regarding whether to use a case, consult Risk Management.*

Integrating Simulation Into Course Delivery

One option for customizing TeamSTEPPS instruction involves using simulation-based training to teach TeamSTEPPS. Simulation-based training has been shown to be effective in providing education and practice opportunities to health care professionals. With regard to the instruction of TeamSTEPPS Master Trainers, the use of simulation provides an opportunity to demonstrate and practice TeamSTEPPS tools and strategies, as well as giving these instructors-in-training a model of an alternative method for teaching TeamSTEPPS.

Simulation can take various forms. It may be simple, requiring no technology (i.e., low fidelity), or involve the use of sophisticated, high-technology simulators (i.e., high fidelity). For example, simple role play exercises or teamwork activities such as the paper chain exercise described in the TeamSTEPPS curriculum are forms of low-fidelity simulation. High-technology mannequins that allow training participants to practice the use of tools and strategies in a realistic environment are examples of high-fidelity simulators. It is important to note that, when used correctly, either approach can effectively provide the targeted instructional outcomes; instructors (and their organizations) do not require access to sophisticated equipment to integrate simulation into TeamSTEPPS instruction.

For those interested in integrating simulation into TeamSTEPPS course delivery, a resource has been developed and provided by AHRQ to provide instruction and guidance on the development of scenario-based training. This training guide, *Using Simulation in TeamSTEPPS Training*, is available on AHRQ's Web site at [Using Simulation](#). Specifically, this resource guides users through the development and use of scenarios, including writing learning objectives, identifying and developing performance measures, and debriefing participant performance. In addition, TeamSTEPPS includes 131 scenarios, discussed previously, that can also be used or adapted for TeamSTEPPS training.

Conducting the Practice Teaching Session

As discussed previously, the Master Trainer Course may include an optional Practice Teaching Session (Module 12). The purpose of this session is to ensure that Master Trainers are skilled in delivering TeamSTEPPS instruction to others. More specifically, this activity (1) provides participants with an opportunity to gain practice and comfort in teaching the material before returning to their organization; and (2) ensures that participants' understanding of the TeamSTEPPS skills, tools, and strategies aligns with those intended by the curriculum.

* Health Insurance Portability and Accountability Act.



If conducted, this session typically occurs on Day 3 of the training, for approximately 4 hours, depending on the number of participants and the time allotted for the Master Training. Module 12 in the Master Training curriculum describes one approach to conducting this session, which involves having each participant teach one of the Fundamentals modules as a “lead” instructor. Feedback is provided both by the other participants and by an instructor (Master Trainer).

One alternative to this approach is to divide the participants into smaller groups, to which each is assigned an instructor (Master Trainer). The groups will require dedicated spaces to conduct the teach-backs simultaneously. An advantage to this approach is that it ensures that each participant receives adequate practice while maximizing available training time.

Another alternative is to assign participants (or allow them to select) a specific TeamSTEPPS tool or strategy to teach back to the class. Similar to the activity described in Module 12, the assignment (or selection) of a tool would occur in advance of the Practice Teaching Session. This type of alternative session can be useful when time is limited.



Course Preparation

An effective training session involves preparing for the course, delivering the material, and reviewing results of the presentation. In this section, instructor responsibilities and suggested approaches for preparation are discussed.

Selecting Instructors

The role of TeamSTEPPS instructors is not restricted to classroom teaching. TeamSTEPPS success is not guaranteed by classroom training alone. As is the case with any change effort, the introduction of TeamSTEPPS requires champions in everyday practice to reinforce, monitor, and role model teamwork principles; instructors (Master Trainers) serve as change agents for the teamwork initiative.

Due to the complexity of the instructor role, it is imperative that selected candidates be:

- Viewed as advocates of teamwork. Instructors are the champions of TeamSTEPPS within the department, facility, or organization. They must believe in the principles of teamwork and be the model for implementing teamwork actions during day-to-day operations, setting the example.
- Members of an interdisciplinary training team. To reinforce the team focus and interdisciplinary nature of this program, the TeamSTEPPS curriculum should always be taught by a physician/nurse team and augmented by others (e.g., a technician, an educator) when possible, or as appropriate.
- Dynamic presenters, individuals with a desire and talent to teach and make a point. Instructors should have strong oral communication skills. Seek volunteers if your process allows. The act of volunteering carries with it an internal commitment to succeed.
- Viewed as leaders among their peers and administrators. Instructors do not have to hold a position of legitimate authority in the department, facility, or organization, but should be highly respected members of the workplace who can influence change.
- In positions that allow flexibility in scheduling. Instructors must be able to assume an active teaching role during periods of course delivery. In addition, they must be highly visible, accessible, and available for teamwork coaching throughout the change effort.

Selecting Coaches

Learning does not stop after the completion of the course. As an aspect of their change team responsibilities, Master Trainers will determine how to use coaches to provide ongoing training, support, and reinforcement of the use of TeamSTEPPS in the work unit. The number of coaches per staff member is higher than that for instruction. For coaching to be effective, the recommended ratio is one coach for every 10 staff members. To that end, Master Trainers may serve as coaches, but the change team may decide to identify additional staff members to serve as coaches. New coaches require orientation to the coaching role and techniques for coaching, as discussed in Module 9 - Coaching Workshop.



Course Materials

The TeamSTEPPS curriculum is based on evidence from behavioral methods, human factors, and cultural change in health care. In addition, inspiration for the TeamSTEPPS curriculum was derived from John Kotter's book *Our Iceberg Is Melting: Changing and Succeeding Under Adverse Conditions*. This book proposes a set of steps to initiate and sustain change in an organization through the story of a penguin colony faced with a melting iceberg. This book provided the design concept for the Instructor Manual and presentation slides.

The Master Trainer Course materials include the TeamSTEPPS Instructor Manual, classroom slides, and videos. Each of these is described below in more detail. The contents of the Instructor Manual and additional materials are available online at [TeamSTEPPS 2.0](#). The Fundamentals Course is part of the Master Trainer Course; therefore, the Instructor Manual and related materials are resources for delivering this course. The Essentials Course includes its own instructional materials, which are available online at [Essentials Instructional Module and Course Slides](#).

Instructor Manual

The Instructor Manual should be used as a course planning tool and a reference guide for teaching the course. It is very important to use the Instructor Manual as a course preparation tool, as advance planning is required for effective course delivery.

The Instructor Manual includes several resources:

- This TeamSTEPPS 2.0 Course Management Guide.
- Materials to deliver the Fundamentals Course (either as Day 1 of the Master Trainer Course or as a train-the-participant course). These materials include an Instructor Guide for each of the 7 modules, as well as the associated evidence base, any associated exercise handouts, and the slides (presented in handout format in the Instructor Manual and as modifiable PowerPoint slides).
- Materials to deliver the Trainer/Coach Course (Day 2 of the Master Trainer Course). These materials include an Instructor Guide for each of the 4 modules, as well as any associated exercise handouts and the slides (presented in handout format in the Instructor Manual and as modifiable PowerPoint slides).
- Materials to deliver the optional Day 3 (Module 12 – Practice Teaching Session) of the Master Trainer Course). These materials include an Instructor Guide, the Practice Teaching Feedback Form, and the module slides (presented in handout format in the Instructor Manual and as modifiable PowerPoint slides).

As noted, for each instructional module, an Instructor Guide is provided. This resource provides instructors with important information for planning the delivery of the module. It is strongly recommended that Master Trainers use the Instructor Guides to prepare for course delivery. These documents ensure that Master Trainers are familiar with the contents of each module and know the instructional material that should be conveyed to training participants.



Each Instructor Guide includes an Instructor Outline. This resource not only outlines the sequence of content, but also lists any materials or videos that are needed and indicates content and exercises that may be considered optional if time is constrained. Where relevant, additional resources are also listed as sources of information, content, or videos that can be used to customize a module for a given audience.

For each slide within a given module, the Instructor Guide also provides text that conveys the information an instructor should share with participants to ensure that the module’s instructional objectives are achieved. This text need not be viewed as a “script,” but should be reviewed carefully to ensure that all key points are effectively delivered to training participants. The Instructor Guides also provide instructors with instructions and, where appropriate, alternatives for facilitating discussions and exercises within the modules.

The Instructor Guide includes icons throughout the modules to notify the instructor or identify different actions that should be taken by the instructor or participant. Each icon and its corresponding action is shown below.

	Time		Discussion
	Materials		Play Video
	Instructor Note		Video Time

At the end of each Instructor Guide, any supplemental materials are included. These materials include the evidence base for each of the Fundamentals modules and any exercise handouts/worksheets associated with a given module.

TeamSTEPPS Additional Materials

In addition to the Instructor Manual, TeamSTEPPS includes modifiable versions of the course materials, including the course slides. Other materials, such as the sample course agenda and measurement tools, are also included. The website also includes the Essentials Course materials, as well as a set of specialty scenarios. These scenarios can be used to supplement training or to develop exercises or simulations that will be most relevant to training participants.

TeamSTEPPS materials are available at [TeamSTEPPS 2.0](#).

The website also provides users with all videos from the curriculum, as well as some additional videos that can be used to customize training. Most video vignettes are provided in pairs that include one version that depicts an “opportunity” for improvement and one that depicts a teamwork “success.” Shorter video clips are also available to highlight the use of specific TeamSTEPPS tools and strategies. As noted previously, a matrix of the available video vignettes by TeamSTEPPS skill is provided in Appendix B.



Activities to Complete Prior to the Course

Several actions should be taken prior to class to ensure an effective training session. Review the goals of each learning module and practical exercise. Know and practice teaching the material to be presented; information about training techniques is provided as a reference in Appendix D. A multidisciplinary training team should teach the course and, to the degree possible, scheduled instructors should be present for the entire session. (Instructors informally educate participants as to the value of the training when they themselves jump in and out of the sessions.)

There are a number of operational activities that must be completed prior to the day of the course. Note that some of the required tasks should be completed well in advance of the course. Therefore, it is strongly recommended that the tasks presented in the checklist that follows be reviewed as soon as an organization has decided to conduct TeamSTEPPS training.

Course Preparation Checklist

- Select and coordinate dates with the appropriate decisionmakers.
- Schedule classrooms (as far in advance as possible).
 - If conducting a Master Trainer Course, schedule breakout rooms, if desired, for the Implementation Planning Workshop.
 - Ensure that classrooms are/can be equipped with needed technology to conduct the course.
- Develop and publish the list of available sessions, if multiple training sessions are being offered.
- Coordinate meal and refreshment support, as appropriate.
- Schedule participants.
- Submit for and coordinate the process to obtain continuing education credits through your local provider.
- Distribute advance information to scheduled participants, including a course agenda. Make sure participants have enough time to review information prior to the course.
- Obtain or print participant materials (e.g., pocket guides or presentation notes pages).
 - If conducting a Master Trainer Course, you may wish to order the Instructor Manual from AHRQ. (For more information, go to:
<http://teamstepps.ahrq.gov/abouttoolsmaterials.htm#orderMaterials>.)
- Meet with the training team in advance (training teams should be interdisciplinary).
 - Assign modules to each instructor.



- Ensure that all instructors know the sequence of events for the course, including plans for breaks.
- Prepare for instruction.
 - Review the material, especially the Instructor Guide for each assigned module.
 - Review modules and determine what, if any customization is required. It is helpful to review a list of the course participants and identify their clinical positions or work units. To the extent possible, consider integrating scenarios, video vignettes, or personal experiences that align with the audience.
 - Determine which, if any, optional content and exercises you will use.
- Practice for delivering instruction.
 - Use any needed equipment to ensure comfort and familiarity.
 - For newer instructors, present a practice class. After a training session, many change teams determine the need for additional coaches. An excellent opportunity for a “first” or “practice” class is the opportunity to teach to early adopters, off-shift leaders, and new coaches. The new instructors benefit from growth in confidence and core capabilities and the unit, department, or organization benefits by the addition of enthusiastic champions who will serve as coaches and problem solvers.
 - For more experienced instructors, continue to review the Instructor Guides and materials. While it is encouraged that TeamSTEPPS be adapted to an organization, it is strongly recommended that instructors periodically review the materials to ensure that they are conveying the intended key points and achieving the instructional objectives.
- Prepare materials and setup for the course.
 - If conducting a Master Trainer Course for which you have ordered Instructor Manuals from AHRQ, ensure that these have arrived prior to the day of the course. Each one will require unpacking. Do not leave this activity until the day of the course, as it requires time to complete.
 - Ensure that you have materials required to facilitate discussions and exercises, such as flipcharts, markers, and materials for activities such as the Teamwork Exercise described in the Fundamentals Course.
 - Ensure that needed equipment is available and operational.



- In addition to name tags (e.g., stick-on), if training is being conducted to a larger group or to a group of individuals that all instructors do not know personally, name tents are recommended so that instructors may easily engage all participants in a personal manner.

- If conducting a Master Trainer Course, consider space availability to conduct the Implementation Planning Workshop. Each team will require space to work and talk together about their Action Plan. This can involve reconfiguring tables within a single space or allowing teams to move to separate breakout rooms or other areas of the facility to work and talk together.



Course Delivery

As noted, the importance of precourse preparation is essential for effective training. There are also a number of activities that require completion just prior to delivering the course, during the course, and after the course. This section discusses these activities.

Activities to Complete on the Day of the Course

Several actions should be taken to ensure that training sessions go smoothly. The actions presented in the checklist that follows represent those that should be completed prior to the start of training on the day of the course.

Course Delivery Checklist (Prior to the Start of Training)

- Arrive early to allow time for preparation and any troubleshooting.
- Ensure that all materials (handouts, supplies, etc.) are available.
- Ensure that all needed equipment is available and operational.
- Ensure that the classroom setup is appropriate.
- Check setup for refreshments if appropriate.
- Have an attendance roster available as participants arrive.
- If continuing education credits are being granted:
 - Bring certificates for distribution.
 - Make sure information is complete on the attendance roster.
- Provide participant materials.

Activities to Complete When Delivering the Course

The checklist that follows presents the operational activities that should be completed during course delivery.

Course Delivery Checklist (During Training)

- (At the start of the course)* Ensure that all participants sign the attendance roster.
- (At the start of the course)* Ensure that all participants have a name tag. Consider using first name only name tags (stick on). This aids to flatten the hierarchy among participants.



- If continuing education credits, including CMEs, CE, or CEUs, are being granted, read the disclosure statement informing students that the class will be conducted in an environment of nonattribution.
- Deliver instruction using all of the available training aids and multimedia equipment to enhance the presentation.
- Gather baseline data, if appropriate. Distribute and collect any measures you wish to use to assess the current state of the unit, department, or organization, such as the AHRQ Patient Safety Culture Surveys and the Patient and Staff Satisfaction Surveys. (If done prior to course, results can be incorporated into the presentation.)
- (*At the end of training*) Distribute and collect course evaluations at the completion of the course. (See Module 10 – Measurement for more information on the course evaluation.) Student feedback is important for assessing the effectiveness of the training session. It is also essential for gathering data used to modify the course.
- (*At the end of training*) Distribute CME/CE/CEU certificates.

Activities to Complete After the Course

Final actions that need to be completed are presented in the checklist that follows.

Postcourse Delivery Checklist

- Debrief the course with fellow instructors. Discuss what went well and what could be improved. Review course evaluations to further determine what went well and consider specific recommendations for improvement.
- Maintain an accurate and complete file of course information, including:
 - Participants (i.e., attendance rosters).
 - Course evaluations.
 - Completed, dated, and signed CME/CE/CEU disclosure statements (if such credits are given).
- Submit any information or records required to complete the CME/CE/CEU process for participants (if such credits are given).



Appendix A: Sample Course Agenda



TeamSTEPPS Master Training Agenda

[Training Location]

[Training Dates]

DAY MM/DD	<i>TeamSTEPPS Fundamentals Course</i>	Instructor
0800 – 0815	Welcome	
0815 – 0905	Module 1 - Introduction	
0905 – 0920	Break	
0920 – 1010	Module 2 - Team Structure	
1010 – 1055	Module 3 – Communication	
1055 – 1110	Break	
1110 – 1200	Module 4 - Leading Teams	
1200 – 1300	Lunch	
1300 – 1345	Module 5 - Situation Monitoring	
1345 – 1400	Break	
1400 – 1450	Module 6 – Mutual Support	
1450 – 1505	Break	
1505 – 1600	Module 7 - Summary—Pulling It All Together	
1600 – 1630	Daily Wrap-Up/Evaluations	
DAY MM/DD	<i>Trainer/Coach Course</i>	Instructor
0800 – 0815	Welcome	
0815 – 0915	Change Management: How to Achieve a Culture of Safety	
0915 - 0930	Break	
0930 – 1045	Coaching Workshop	
1045 – 1100	Break	
1100 – 1150	Measurement	
1150 – 1300	Lunch	
1300 – 1530	Implementation Planning Workshop	
1530 – 1600	Daily Wrap-Up/Evaluations	



Appendix B: Video Matrix



Video Matrix

TeamSTEPPS Skill		VIDEO				
		Vignette 1 <i>ED</i>	Vignette 2B <i>Inpatient Medical</i>	Vignette 3B <i>Inpatient Surgery</i>	Vignette 4B <i>L&D</i>	Vignette 5B <i>Physician's Office</i>
COMMUNICATION	• SBAR	✓	✓	✓		✓
	• Handoff	✓		✓	✓	
	• Call-Out				✓	
	• Check-Back	✓	✓	✓	✓	✓
	• IPASSTHEBATON	✓		✓	✓	
	• Time-Out				✓	
LEADING TEAMS	• Brief			✓	✓	
	• Huddle	✓			✓	
	• Debrief				✓	✓
SITUATION MONITORING	• Cross Monitoring				✓	✓
	• STEP		✓			
MUTUAL SUPPORT	• CUS	✓			✓	
	• Two-Challenge Rule					✓
	• Feedback	✓	✓			
	• DESC Script					✓

Checkmarks indicate where the TeamSTEPPS tools are applied in the vignettes.



Appendix C: Additional TeamSTEPPS Modules and Versions



Additional TeamSTEPPS Modules and Versions

In addition to the core TeamSTEPPS curriculum that the Course Management Guide describes, the Agency for Healthcare Research and Quality (AHRQ) has developed a number of additional TeamSTEPPS modules and versions for use in specific health care environments. These additional modules and versions provide resources for customizing TeamSTEPPS instruction to a particular audience. The table below provides information about the additional TeamSTEPPS modules and versions.

Table C-1: Additional TeamSTEPPS Modules and Versions

Module/Version	Location	Description
TeamSTEPPS Rapid Response Systems (RRS) Guide	TeamSTEPPS Rapid Response System Guide	<p>The TeamSTEPPS Rapid Response Systems Guide is designed to help an organization develop and deploy a customized plan to train staff in teamwork skills and lead a medical teamwork improvement initiative from initial concept development through to sustainment of positive changes. This evidence-based module provides insight into the core concepts of teamwork as they are applied to the rapid response system.</p> <p>This guide includes:</p> <ul style="list-style-type: none"> • Instructor Guide and Instructional Slides • Instructional Videos
TeamSTEPPS Dental Module	TeamSTEPPS Dental Module	<p>The TeamSTEPPS Dental Module consists of videos designed to show how dental staff who perform oral surgery and general dentistry can use TeamSTEPPS' teamwork, leadership, mutual support, communication, and situation monitoring skills in their practices.</p> <p>The module includes four instructional videos:</p> <ul style="list-style-type: none"> • Dental Office (Success and Opportunity) • Oral Surgery (Success and Opportunity)



Module/Version	Location	Description
Enhancing Safety for Patients With Limited English Proficiency Module	Enhancing Safety for Patients with Limited English Proficiency	<p>The TeamSTEPPS Limited English Proficiency module is designed to help an organization develop and deploy a customized plan to train staff in teamwork skills and lead a medical teamwork improvement initiative from initial concept development through to sustainment of positive changes. This evidence-based module provides insight into the core concepts of teamwork as they are applied to work with patients who have difficulty communicating in English. Comprehensive curricula and instructional guides include short case studies and videos illustrating teamwork opportunities and successes.</p> <p>This module includes:</p> <ul style="list-style-type: none"> • Instructor Guide and Instructional Slides (Fundamentals Course and Trainer/Coach Course) • Instructor Guide and Instructional Slides (Essentials Course) • Instructional Videos • Pre-Work: Readiness Assessment • Improving Patient Safety Systems for Patients With Limited English Proficiency: A Guide for Hospitals • Evaluation Guide
TeamSTEPPS Long-Term Care Version	TeamSTEPPS Long-Term Care Version	<p>The Long-Term Care version of TeamSTEPPS adapts the core concepts of the TeamSTEPPS program to reflect the environment of nursing homes and other long-term care settings such as assisted living and continuing care retirement communities. The examples, discussions, and exercises are tailored to the long-term care environment.</p> <p>This version includes:</p> <ul style="list-style-type: none"> • Instructor Guide and Instructional Slides (Fundamentals Course and Trainer/Coach Course) • Instructor Guide and Instructional Slides (Essentials Course) • Instructor Guide and Instructional Slides (Supplemental Module) • Implementation Guide • Instructional Videos • Specialty Scenarios



Module/Version	Location	Description
TeamSTEPPS Primary Care Version*	TeamSTEPPS Primary Care Version	<p>The Primary Care version of TeamSTEPPS adapts the core concepts of the TeamSTEPPS program to reflect the environment of primary care office-based teams. The examples, discussions, and exercises are tailored to the primary care environment.</p> <p>This version includes:</p> <ul style="list-style-type: none"> • Instructor Guide (TeamSTEPPS Fundamentals) • Instructional Slides • Instructional Videos

*AHRQ is funding the development of additional resources to support this curriculum.



Appendix D: Training Techniques



Training Techniques

Presentation Skills

Presenting effective classes takes a combination of technical competence, knowledge of the material, and practice. Being an effective presenter is a learned skill. Even when the presenter has indepth knowledge of the material, it is important to practice the delivery for maximum impact.

Speaker Attributes

- Speech – Speak naturally, using the same mannerisms as during a personal conversation.
- Vocabulary – Use terms the audience will understand.
- Enthusiasm – Demonstrate enthusiasm for teamwork. Enthusiasm is infectious and will help to overcome obstacles to learning.
- Sincerity – Course content has serious implications for the staff. That said, it is possible to be serious and still have fun.
- Knowledge and experience – Use your understanding of the subject matter and applied experience to guide the students through the learning process.
- Credibility – As a leader in the department, sharing your personal commitment to teamwork will lend credibility to the course.
- Attitude/self-confidence – A positive attitude about the importance of the subject matter and confidence in your ability to present the material will ensure an effective class session.
- Eye contact – Maintain eye contact with the audience, referring to your teaching guide and audiovisual aids as necessary to ensure accuracy.
- Dress – Dress in a manner that is appropriate to your instructor role and establishes an environment conducive to learning.
- Gestures/mannerisms – Natural is better. Avoid behaviors that create a distraction to learning, such as putting your hands in your pockets or jingling your change.
- Movement – The best way to move around the class is to walk naturally and keep the pace slow. Too much movement can distract students.

Presentation Aids

Several aids are available to assist with the delivery of the TeamSTEPPS course. These include:

- Instructional slides – These require a computer and a projection device.
- TeamSTEPPS instructional videos – These are included online and are embedded in the slides. Ensure that your equipment is set up for audio and visual presentations.
- Whiteboard or flipchart – These training aids enable the user to jot down ideas and thoughts from participants during the presentation.



Difficult Situations

A number of situations may arise in the classroom that can derail the training session. It is important that the instructor be prepared to manage these when they occur.

- You encounter a noncommunicative group or individual:
 - Ask direct questions.
 - Ask “yes/no” questions, then ask for an explanation.
 - Call individuals by name.
 - Restate or rephrase or reword questions to focus attention.
- One of the participants is a controlling, persistent talker:
 - Ask direct “yes/no” questions, thank the trainee, and move back to your presentation.
 - Offer to follow up with the trainee after the presentation.
 - Take the trainee aside during a break and discuss the effect he or she is having on the class. Be tactful but firm.
 - Interrupt with: “That’s an interesting point...let’s see what others in the group think about it.”
- You lose control of the presentation:
 - Re-establish eye contact.
 - Change your position.
 - Redirect the group to the visual aids.
 - Ask direct questions to the more disruptive group members.
 - Change the tone or volume of your voice.
 - Call a break.
- The group gets off topic:
 - Restate your objective.
 - Summarize.
 - Ask “yes/no” questions, then ask for an explanation that relates to the topic.
 - Refer to your visual aids.

Side Conversation

- Call individuals by name and ask an easy question.
- If you are in the habit of moving around the room, stand casually behind the members who are talking. This should not be made obvious to the group.



Adult Learning Model

One of the keys to being an effective instructor is to tailor the presentation to the audience. TeamSTEPPS classes will include a mix of participants from different positions and educational backgrounds (e.g., medical technicians, nurses, physicians, clerks). However, there is one constant in this mixture; all of the participants are adults.

Research has shown that certain teaching techniques enhance training provided to adults. Adults learn best when they are involved in the learning process. The following characteristics are common to adult learners:

- They are self-directed;
- Their orientation to learning tends to be task or problem centered;
- They are motivated by internal incentives;
- They learn best in a climate that is relaxed, collaborative, and mutually respectful; and
- They learn best through experiential activities that have immediate application to life tasks.

CPR Approach (Pike, 1994)

Training expert Bob Pike uses the acronym CPR to address the importance of **content** relevancy, learner **participation**, and **reinforcement** in classroom training. This approach meets the needs of the adult learner and ensures the transfer of training.

Content

- Link goals of the TeamSTEPPS course to local problems. (This answers the question, “What’s in it for me?”)
- Introduce locally defined and fully endorsed internal support structures at appropriate points during teamwork training.
- Use personal vignettes to exemplify teaching points.
- Incorporate only vignettes and examples from events that actually happened.

Participation

- Foster interaction through appropriate classroom layout.
- Encourage learners to share their personal experiences.
- Engage learners in practical exercises.
- Allow time for questions and discussion.

Reinforcement

- Instruct participants to mark central concepts in their notes.
- Reinforce key teamwork actions at the end of each module.
- Clarify the objectives of each practical exercise during facilitation.
- Reinforce behaviors depicted in the videos.



Facilitation Skills

Facilitation is a method of instruction that uses the principles of the adult learning model. Unlike didactic instruction in which the instructor leads the discussion step by step and summarizes each topic, a facilitation approach promotes student learning through a process of inquiry in which the instructor asks questions that generate discussion relative to principles taught in the course.

Facilitation Basics

An effective presentation applies the facilitation basics listed below:

- Encourage student participation. The adult learning model is built around the concept of self-learning. One way to ensure that students are involved in the learning process is to encourage participation in the discussions.
- Adapt the level of facilitation to the students. It is important to know the audience. Depending on the subject and the students' experiences, it is possible to use varying degrees of facilitation during a training session.
- Ensure that all critical topics are covered. Keep in mind the objectives of the class; if the discussion goes off on a tangent, guide it back on track.
- Integrate instructional points as needed. Make sure the discussions stay focused on the subject. Use questions and statements to emphasize instructional points.

Facilitation Techniques

A skilled facilitator encourages student participation through:

- Nonverbal feedback – Body language provides instant feedback to the speaker. Use it to your advantage; show the speaker that you are receptive to his or her opinion or idea.
- Short interjections – Use short statements to affirm discussion points or guide the discussion toward a learning objective.
- Echoing – Restate the point to ensure that other class members were able to hear.
- Reflecting – Direct the point back to the student or class.
- Expanding – Expound on the student's point.

Asking Questions

Questions are one of the most important tools available to the facilitator. Used correctly, questions provide immediate feedback about training effectiveness, are a means of assessing students' knowledge, and can be used to guide discussions. When used incorrectly, questions can stifle student participation and the learning process.



Questioning techniques include:

- Direct question – In this questioning technique, the facilitator identifies the person who will answer the question before it is stated. This action may create anxiety unless a supportive and trusting environment has been firmly established.
- General address question – When using this questioning technique, the facilitator will first state the question, pause, and then call on an individual to answer the question. This technique is better than the direct question because it tends to create less anxiety and students have time to formulate a response.
- Return question – This technique is similar to the reflecting technique discussed in the previous section. Instead of answering a student's question, the facilitator returns the question to the student for an answer.
- Relay – Instead of answering a student's question, the facilitator chooses another student to answer. This is most effective when combined with the general address questioning technique.

Questions should focus students' attention on the training objective and involve them in the learning process. The following question set is one method of doing this.

- What has happened up to this point?
- What do you think about what happened?
- What would you do differently, if anything?

What does the instructor do if there is no response to a question? The answer depends on the level of facilitation being used.

- High-level facilitation – Use silence or pauses to elicit responses. It will normally take only a short period of time before the participants will feel obligated to speak.
- Intermediate-level facilitation – Reword the question to ensure understanding, prompt the participants with bits of information, and try to avoid answering the question.
- Low-level facilitation – Answer the question, but confirm that the class understands and agrees with the answer.