

# AHRQ Safety Program for Ambulatory Surgery

## Implementation Guide



### Appendix J. Coaching Tool Instructions and Observation Tool With Coaching Section

After using the observation tool to collect information regarding the processes performed in the operating room or procedure room, use the coaching tool to coach the team on what it is doing well and how it can improve. This tool is similar to the observation tool with the difference being that you will now be asked to make notes and coach teams based on what you watched in the operating/procedure room using the three-part question.

#### **Instructions**

1. Print a hard copy of your facility's checklist. Take this copy of your checklist into the operating room/procedure room to observe cases. During these observations, mark elements on your checklist that the team discussed.
2. After observing the team, answer the checklist use questions, located in this appendix.
3. Coach the team based on what you observed using the three-part question. The goal is to watch how your team performs the checklist, keeping in mind that best practice is to have every item on your checklist discussed for every patient, every time. The checklist use questions can be used to help guide the discussion. You can use the three-part question guide on the next page to help you.
4. Feel free to write on this tool as needed.



## Three-Part Question Guide

When you coach, the most effective way is to ask the team a series of questions. A good coach wants team members to analyze the situation for themselves without telling them the answers. Using the three-part question gives your team the opportunity to reflect on what happened and to propose its own solutions.

### Three-Part Question

**Part I: Your Observation – Tell the team what you saw**

- Explain what you saw. This could be something that can be improved or something the team did well.
- Be specific and clear with your examples.
- Try to remain as objective as possible and not criticize the team’s performance.

**Part II: Your Opinion – State why you think what you saw is important to talk about**

- Share why you are focusing on a specific behavior or action and explain its importance.
- Remember to keep it simple, focused, and respectful.

**Part III: Your Question – Ask the team a question to help team members reflect on what happened**

- Shows your curiosity and interest in why the team performed the way it did.
- Allows the team to reflect on its performance and explain why it did or did not do something.
- The question can help you work with the team to make improvements or continue doing the things it did well during the case.

The following table provides examples that you can use for each of the portions of the three-part question.

Your Observation	Your Opinion	Your Question
I saw...	I think...	Can you help me understand?
I observed...	I believe...	I am curious, what do you think happened?
I watched...	It is really important to...	How did that make you feel?
The team did...	I am pleased because...	What is your point of view?
The team didn’t...	I am concerned...	How did you experience that?
I noticed...		I wonder what you think happened?

# Preoperative Briefing Before the Patient is Sedated, Coaching Tool

Date: \_\_\_\_\_  
(mm/dd/yyyy)

## Checklist Use Questions

After observing the team, please answer the following questions about how the checklist was used.

1. Did the circulating nurse discuss all items when at least one other care provider was present?

- Yes     Some, not all     No

2. Was the patient and/or family actively engaged in this discussion?

- Yes     Somewhat     No     N/A

3. Were the checklist items done from memory?

- Yes     No

4. Did each team member who was present say something?

- Yes     Some, not all     None

5. Could the team have performed this section of the checklist better?

- Yes     No

## Notes

You can use the space below to write any notes you may have while observing the team.

## Coach the Team

Reflect on what you saw the team do well or what it could have done better during the cases using the three-part question. Use the Three-Part Question Guide for more information on how to use the three-part question.

Your Observation	Your Opinion	Your Question
I observed... I noticed... The team did...	I think... I am concerned... It is really important to...	Can you help me understand? I am curious, what do you think happened? How did that make you feel?

# Before the Procedure Is Started, Coaching Tool

Date: \_\_\_\_\_  
(mm/dd/yyyy)

## Checklist Use Questions

After observing the team, please answer the following questions about how the checklist was used.

1. Did someone in the room ensure everyone was ready to perform the checklist before starting the discussion?  
 Yes  Somewhat  No
2. Did everyone in the room come to a “hard stop” for the briefing discussion?  
 Yes  Some, not all  No
3. Did every person in the room introduce themselves?  
 Yes  Some, not all  None
4. Were the checklist items done from memory?  
 Yes  No
5. Did each team member say something?  
 Yes  Some, not all  No
6. Could the team have performed this section of the checklist better?  
 Yes  No

## Notes

You can use the space below to write any notes you may have while observing the team.

## Coach the Team

Reflect on what you saw the team do well or what it could have done better during the cases using the three-part question. Use the Three-Part Question Guide for more information on how to use the three-part question.

Your Observation	Your Opinion	Your Question
I observed...	I think...	Can you help me understand?
I noticed...	I am concerned...	I am curious, what do you think happened?
The team did...	It is really important to...	How did that make you feel?

# Before the Patient Leaves the Room, Debriefing Coaching Tool

Date: \_\_\_\_\_  
(mm/dd/yyyy)

## Checklist Use Questions

After observing the team, please answer the following questions about how the checklist was used.

1. Did someone in the room ensure everyone was ready to perform the debriefing before starting the discussion?  
 Yes  Somewhat  No
2. If there was a specimen still in the room, did a team member read back the label off of the container during the debriefing discussion?  
 Yes  No  N/A
3. Were the checklist items done from memory?  
 Yes  No
4. Was every team member paying attention to the discussion?  
 Yes  Some, not all  No
5. Was the surgeon/proceduralist in the room when the debriefing took place?  
 Yes  No
6. Could the team have performed this section of the checklist better?  
 Yes  No

## Notes

You can use the space below to write any notes you may have while observing the team.

## Coach the Team

Reflect on what you saw the team do well or what it could have done better during the cases using the three-part question. Use the Three-Part Question Guide for more information on how to use the three-part question.

Your Observation	Your Opinion	Your Question
I observed...	I think	Can you help me understand?
I noticed...	I am concerned...	I am curious, what do you think happened?
The team did...	It is really important to...	How did that make you feel?