

### Tool 3: Surgical Teamwork Observation Tool

Date of procedure: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Hospital name: \_\_\_\_\_

**Procedure Information**

Patient age: \_\_\_\_\_ Time of incision: \_\_\_\_:\_\_\_\_ AM / PM Urgent/emergent case (requiring same-day completion):  Yes  No  
 Patient gender:  M  F Surgical end time: \_\_\_\_:\_\_\_\_ AM / PM Significant nonclinical disruptions:  Yes  No  
 Surgeon's specialty: \_\_\_\_\_ Case delayed >30min:  Yes  No  
 Procedure performed: \_\_\_\_\_ Patient disposition:  Inpatient  Outpatient

**Observer Information**

Observer age: \_\_\_\_\_ Observer gender:  M  F Years in current role at this hospital: \_\_\_\_  
 Observer role:  Nurse Manager  QI / Patient Safety personnel  Other: \_\_\_\_\_

The statements in the table below relate to surgical team members' interactions during this procedure. Please consider the following definitions as you read them:

**Clinical leadership:** Exerting control or playing a decision-making role in the patient's clinical care. Any member of the team may demonstrate clinical leadership in the course of a surgical procedure.

**Team members:** Any individual present and participating in a surgical procedure (e.g., physicians, nurses, surgical techs).

**Technical tasks:** The specific activities performed by team members in the course of a surgical procedure.

On a scale of 1 – 5, with 1 being "NEVER", 2 being about 25% of the time, 3 being about half the time, 4 being about 75% of the time, and 5 being "ALWAYS", please indicate how often the following behaviors occurred **during this procedure**:

	Never				Always	
1. Clinical leadership was shared among disciplines in response to changes in the patient's condition or issues that arose during the operation.	①	②	③	④	⑤	
2. Physicians were <b>only</b> open to suggestions from other physicians.	①	②	③	④	⑤	
3. Physicians were present and actively participating in patient care prior to skin incision.	①	②	③	④	⑤	
4. Physicians maintained a positive tone throughout the operation.	①	②	③	④	⑤	
5. Verbal communication among team members was easy to understand (e.g., clearly articulated and spoken at an adequate volume).	①	②	③	④	⑤	
6. Team members shared key information as it became available.	①	②	③	④	⑤	
7. Speakers made a visual or spoken effort to confirm that important information was received.	①	②	③	④	⑤	
8. Recipients made a visual or spoken effort to confirm that they understood the information communicated.	①	②	③	④	⑤	
9. Team members appeared eager to help one another.	①	②	③	④	⑤	
10. Team members from different disciplines discussed the patient's condition and the progress of the operation.	①	②	③	④	⑤	
11. Plans for patient care were adapted as needed.	①	②	③	④	⑤	
12. Technical tasks were well coordinated among team members.	①	②	③	④	⑤	
13. Team members referred to each other by role instead of name (e.g., "Nurse" instead of "Dana.")	①	②	③	④	⑤	
14. Discussions took place in a calm, learning-oriented fashion.	①	②	③	④	⑤	
15. Team members reacted appropriately when their potential errors or mistakes were pointed out.	<input type="radio"/> N/A	①	②	③	④	⑤
16. Potential errors or mistakes were pointed out <b>without</b> raised voices or condescending remarks.	<input type="radio"/> N/A	①	②	③	④	⑤
17. Team members called attention to potential hazards or omissions.	<input type="radio"/> N/A	①	②	③	④	⑤
18. New or junior team members spoke up with information they thought the team should know.	<input type="radio"/> N/A	①	②	③	④	⑤
19. Team members appeared to struggle <b>and did not</b> ask one another for help.	<input type="radio"/> N/A	①	②	③	④	⑤

On a scale of 1 – 5, with 1 being "POOR" and 5 being "EXCELLENT", please rate your overall impression of how well team members worked together **during this procedure**:

	Poor				Excellent
20. Please rate surgical teamwork during this procedure.	①	②	③	④	⑤

■ Please use the back of this form to provide further comments. ■