



SAFE

SANFORD ACCOUNTABILITY FOR EXCELLENCE



Leader Training
Guide



SANFORD
HEALTH

WE'VE GOT SKILLS

A SAFE SKILLS REVIEW

UNIVERSAL RELATIONSHIP SKILLS

Universal Relationship Skills are simple communication practices to show respect and create familiarity. When used correctly and consistently, they can increase the frequency, efficiency and effectiveness of communication which leads to an environment where everyone feels a part of the team and safe to speak up for the sake of those we serve.

Some Universal Relationship Skills are nonverbal, such as smiling and making eye contact. Some are verbal, like saying hello.



Warmly greet others; say "Hello."



Introduce using preferred names and explain roles. Feel free to share correct pronouns.



Listen with empathy and intent to understand.



Communicate positive intent and take ownership of our actions.



Provide opportunities for others to ask questions.

UNIVERSAL RELIABILITY SKILLS

Universal Reliability Skills are designed to reduce the probability of unintentional human error. Every employee should consistently use these skills.



Attention to detail

Self-check using STAR (Stop, Think, Act, Review), Cross-Check and Coaching



Communicate clearly

Clarifying Questions
Phonetic & Numeric Clarification
3 Way Repeat & Read-Back
SBAR (Situation, Background, Assessment, Recommendation)



Questioning attitude

Validate & verify



Know why and comply

Continuous use & reference use



Speak up for safety

Escalate using ARCC (Ask, Request, Concern, and Chain of Command)

UNIVERSAL LEADER SKILLS

As leaders, we are committed to the safety of those we serve and each other. We demonstrate this promise in every action, from the frontline to the boardroom.



Message safety and reliability first

SAFE story at the start of meetings

Ask the safety question when making decisions



Create closed-loop reliability huddles

Daily safety briefs

Daily departmental huddles

Local learning systems



Role model & influence behavior expectations

5:1 feedback

Round to Influence (RTI)



Apply fair & just accountability principles

Performance Management Decision Guide (PMDG)

Stand-Up for those who speak up for safety

Health Care Reliability Dictionary

<u>Engagement:</u>	The relationship between an organization and its members. One who is fully engaged takes positive action to advance the organization's mission.
<u>Experience of Care:</u>	A subjective appraisal (from a user perspective) of <i>quality > expectations</i> , also known as perceptual quality.
<u>Patient/Resident/Client Experience:</u>	The total sum of all interactions: safety, quality and experience of care.
<u>Power Distance:</u>	How others perceive the difference between your authority and theirs.
<u>Quality:</u>	An objective appraisal (from a producer perspective) of <i>safety</i> (protection from harm) and <i>effectiveness</i> (best probability of a positive clinical outcome).
<u>Reliability:</u>	A probability that a system will yield a specified result; expressed as a ratio (0.98 or 98:100 or 98%) or a frequency (one per year).
<u>Value:</u>	A subjective appraisal of <i>patient experience</i> relative to <i>cost</i> and <i>time</i> (to realization).

UNIVERSAL LEADER SKILLS



Message Safety & Reliability First

SAFE Story at the Start of Meetings

What is a SAFE Story?

- Share your convictions relative to safety, quality or care
- Explain how the story contributes to our mission, vision and values
- Explain how our policy and practice contribute
- Be transparent – share wins and lessons learned within our health care system
- Learn from external organizations about harm, incidents and errors
- Share a SAFE story in any setting (virtually, in-person, etc.)
- Discuss the importance of reporting problems and speaking up for safety
- Thank them for practicing/working safely

When to use a SAFE Story

- All scheduled meetings with a prepared agenda should start with a SAFE story
- Meetings with outside entities start with a SAFE story which is a representation of our culture

Sharing a Good Story

- Talk about what you know – be authentic
- Be specific and use names whenever possible
- A SAFE story is approximately two minutes in length

SAFE Story Planner

Opening	I would like to share a message about the importance of:
Message	
Closing	And that is why it is important that everyone:

SAFE Story database **Inside Sanford>Our Sanford>SAFE>SAFE Stories.**

Ask the Safety Question when making Decisions

By putting safety first in our words and actions, leaders place a focus on safety for the benefit of those we serve and each other – all of whom have placed a special trust and confidence in our ability to care for them.

Questions to Ask:

- How will this affect the safety of those we serve?
- How will this impact the outcome (positively or negatively) of those we serve?
- How will this affect our team(s)?
- Will our employees be more or less likely to provide good care?
- Will this increase the probability of harm? Or create the possibility of a different kind of harm?
- How do we know our decision will make the situation better or more efficient?



Statements to Avoid:

- We will never get more employees – or more equipment, space, supplies, etc.
- We cannot afford it.
- We have always done it that/this way.
- They say we have to do it this way.
- We've asked before and they said no.
- We don't have time.





Create Closed-Loop Reliability Huddles

Prepare to Participate

Consider yourself and ask others:

- Do we have any **high-risk** situations?
- Do we anticipate anything **out of the ordinary**?
- Are we dealing with any **situations or conditions that distract** our ability to focus or think critically about those we serve and each other?
- Are there any issues that we know about that may **impact others**?
- What conditions **outside our team** could impact our ability to deliver safe, quality care today?
- Are there any **deficiencies** in information, equipment, supplies or employees that will make it hard to deliver safe, high-quality care?

If any of the above...

What actions are we taking to be safe?

If no issues...have a questioning attitude to see if we really don't have issues

We have what it takes to be SAFE today!

Look Back - examples

Serious Safety Events (SSE) & Precursor Safety Events	Safety Events Related to the Employees	Reliability Events
<ul style="list-style-type: none"> ▪ Injuries to those we serve ▪ Assessment or treatment delays or deficiencies ▪ Falls, infections, skin breakdown ▪ Medication errors ▪ Security breach ▪ External/internal communications ▪ Abuse or neglect 	<ul style="list-style-type: none"> ▪ Slips/trips/falls ▪ Exposures to infectious disease ▪ Assaults ▪ Maintenance issues ▪ Environmental services ▪ Facility issues ▪ Food services 	<ul style="list-style-type: none"> ▪ Lost specimens ▪ Critical near misses ▪ Process issues ▪ Anything that negatively impacts operations ▪ Grievance and experience concerns from those we serve ▪ Cybersecurity awareness

Look Ahead – examples

- Procedures/processes we have never done before
- Equipment including new items, failures or concerns
- New high-risk medication
- Issues that are causing staff to develop workarounds
 - Point-of-care testing access, lack of equipment, staffing shortage, etc.
- Anything new or different that increases the probability of error
- Change in communication capabilities
- Change in computer process or level of function
- Facility/environmental issue that poses a hazard
- Social safety issue – can involve those we serve and/or employees
- Deficiencies in staffing, resources or information

Huddle and Huddle Board Tips

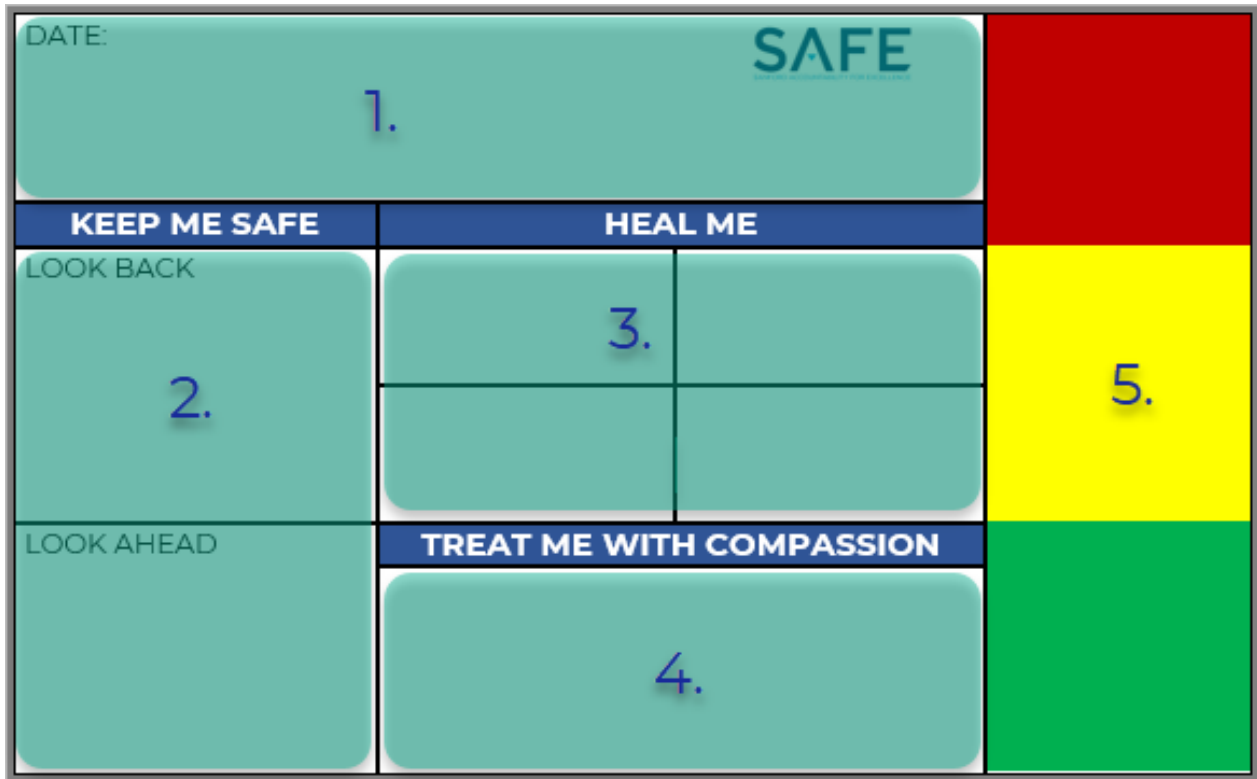
<i>Preparing for the Huddle</i>	<i>Healthy Huddles</i>	<i>Leader Take-Aways</i>
<p>Needed items:</p> <ul style="list-style-type: none"> ▪ SAFE story ▪ Days from last Serious Safety Event (SSE) & employee harm <p><i>Keep me SAFE</i></p> <ul style="list-style-type: none"> ▪ Look back ▪ Look ahead <p><i>Heal me</i></p> <ul style="list-style-type: none"> ▪ Metrics: SSE rate, performance improvement, experience metrics (goals/targets) <p><i>Treat me with compassion</i></p> <ul style="list-style-type: none"> ▪ Recognition: <ul style="list-style-type: none"> ○ Birthday, anniversary, special event, milestone ▪ SAFE skill reinforcement (Skill of the Month) ▪ One-page SAFE skill toolkit ▪ Personal connection with those we serve <p>Optional but highly recommended:</p> <ul style="list-style-type: none"> ▪ Red, Yellow, Green area (employee idea generator) ▪ SAFE logo (best practice) ▪ Patient experience scores and/or comments 	<ul style="list-style-type: none"> ▪ Start with a SAFE story ▪ Engage direct reports and frontline staff ▪ Recognition (5:1 feedback) ▪ Take opportunities to tie back to SAFE skills – real time ▪ Looking back – closing the loop ▪ Look ahead – hot spots ▪ Clear goals with measurements ▪ Identify a single problem owner and time for resolution ▪ Give clear direction about prioritization 	<ul style="list-style-type: none"> ▪ Always start the huddle at the same time every day ▪ Should only be 10-15 minutes maximum ▪ Have a robust SAFE board that can speak for itself (if an employee cannot attend, they can go to the SAFE board and understand what was covered). ▪ Huddle is a time to talk about what makes a successful day, not a laundry list of updates. ▪ Feedback from employees on the huddle and huddle board. ▪ In the initial stages, leadership leads the huddle to set expectations. Leading the huddle can be handed down to other leaders or team members after good habits have been established.

Closed-loop reliability huddle:

Inside Sanford>Our Sanford>SAFE>Leadership Skills>Create closed-loop reliability huddles.

Notes:

Huddle Board Structure



exact formats may vary slightly by market

1. Calling to Huddle

- a. SAFE story
- b. Share Daily Safety Brief (DSB) mentions
- c. Refer to the skill of the month
- d. Check-in

2. Keep Me Safe

- a. Look back / Look ahead
- b. Blame-free environment
- c. Inspire critical thinking
- d. Clearly communicate changes

3. Heal Me

- a. Meaningful metrics
- b. Identify high-risk areas
- c. Improve team awareness
- d. Review projects/interventions
- e. Topics change over time
- f. Impact on daily work
- g. Resource allocation

4. Treat me with compassion

- a. What do we care about?
- b. Patient experience / employee engagement data
- c. Recognition

5. Local Learning

- a. **Red**: idea or concern identified
- b. **Yellow**: being addressed
- c. **Green**: action steps completed



Huddle Maturation

Crawl (reacting)	>	Walk (anticipating)	>	Run (integrating)
Leaders explain what has already happened in the health care setting.		Leaders share and solve operational problems affecting care.		Leaders communicate solutions to problems identified through huddles.
Common expression: "No Issues."		Common expression: "We need _____."		Common expression: "I need to tell you what we have done."
Huddle leader role: Overcoming complacency		Huddle leader role: Allocating scarce resources Prioritizing efforts		Huddle leader role: Promoting implications
Learning is local.		Shared learning is sporadic and reliant on individual outreach.		Learning is reliability shared across the organization.

Notes:



Role Model & Influence Behavior

Types of 5:1 Feedback


<p>Positive (Reinforcing)</p> <ul style="list-style-type: none"> ▪ Prepare thoroughly ▪ Pick a good time and location ▪ Start by asking for permission to give feedback ▪ State clearly the specific behavior and its impact ▪ Listen carefully and react ▪ Thank the recipient 	<p>Opportunity (Redirecting)</p> <ul style="list-style-type: none"> ▪ Decide if you should give feedback ▪ Prepare thoroughly ▪ Ask for permission to give feedback ▪ Describe the specific behavior you noticed and its impact ▪ Listen carefully to responses and react appropriately ▪ Help them take responsibility for changing their behavior
<p>Scenario</p> <p>An employee on your team named Susan comes to you with a concern. Typically, she meanders in her explanations and looks at you expectantly for a solution while you try to sort through the discussion to understand the issue and the need. However, recently, she attended SAFE training, and you've noticed she has been working on her SBAR skill. Today she clearly lays out the situation and background, states her assessment in a way that helps you quickly make sense of what is going on, and then offers a recommendation that seems like a logical solution. You definitely want her to continue using the SBAR skill in this way.</p>	<p>Scenario</p> <p>Jack has worked on your environmental services team for over 15 years. He is a good worker, but often hard to get along with. Jack is using a buffing machine to clean the floor, and you happen to hear Shawna, another member of your team, mention to Jack that the cord is stretched across the hallway. He replies, "So?." She states, "I am concerned this could be a safety risk. Someone could trip." Jack rolls his eyes and snorts "Whatever. Obviously, people can see what I'm doing here." Shawna hesitates and then walks away. How do you provide corrective feedback to Jack? What other next steps will you take with Jack? What about with Shawna?</p>
<p>Let's Practice</p>	<p>Let's Practice</p>

Round to Influence using the 4C's

Greeting – *Hello! Do you have a few minutes for a brief conversation about _____?"*

 **Create a Connection**


- Connect on a personal level with individual.
- Relate to our core values protecting those we serve and each other from harm.
- Tell a story or share facts.

 **Can Do's**

- Review practice expectations, share facts.

 **Concerns**

- Ask, "What makes this hard to do?"

 **Commitment**

- Questions to foster commitment actions:
 - ✓ What will you do to make this your habit?
 - ✓ How will you help others do it?
 - ✓ STOP if you see any risk

Notes:

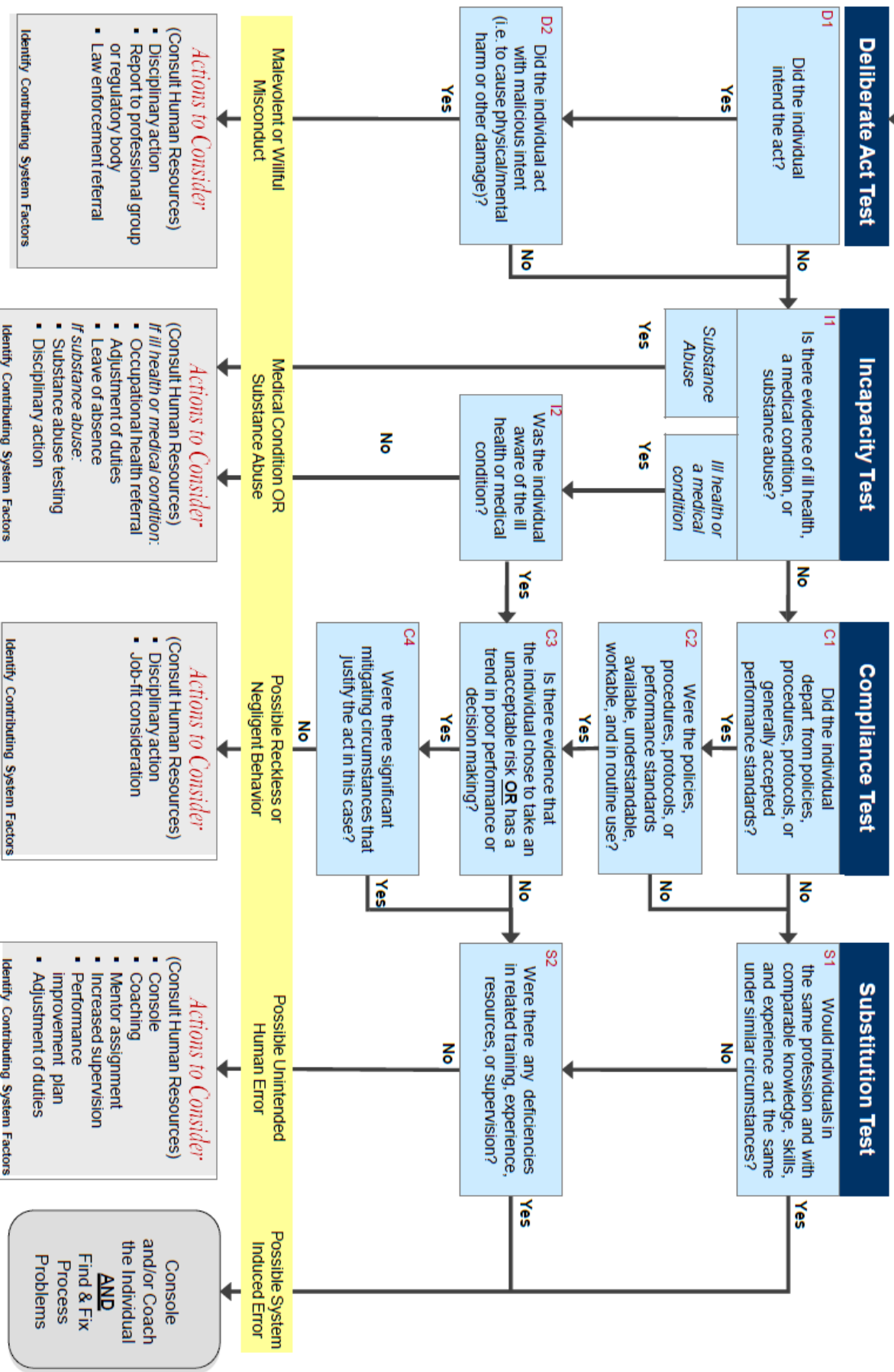


UNIVERSAL LEADER SKILLS

Apply Fair & Just Accountability Principles

Performance Management Decision Guide

Adapted from James Reason's *Decision Tree for Determining the Culpability of Unsafe Acts and the Incident Decision Tree of the National Patient Safety Agency (United Kingdom National Health Service)*





A Resource for Leaders

SAFE Coach Program

What is a SAFE Coach?

A SAFE Coach is a designated employee who educates and encourages specific safety behavior in their department. SAFE Coaches are volunteers who are passionate about safety, committed to SAFE principles and skills, and have an aptitude for coaching, mentoring and speaking up for safety.

What does a SAFE Coach do?

SAFE Coaches receive additional training to act as experts or super-users of SAFE skills and serve as resources on their teams to help improve safety. They observe the use of SAFE skills in their department or unit and provide immediate coaching and support to those around them. They also meet with other SAFE Coaches to improve knowledge and share ideas. SAFE Coaches may also jump-start additional ways for their team members to get engaged in SAFE and our commitment to zero preventable harm.

What is my role as a leader to support the SAFE Coach?

- Inform your team
 - Announce and congratulate your department/unit's SAFE Coach and provide them an opportunity to explain their role within the department/unit and motivation for coaching.
- Engage in two-way accountability with your SAFE coach
 - Schedule monthly 1:1 meetings focused on your coach's progress, observations, challenges and opportunities with SAFE in the unit/department.
- Let them lead SAFE conversations with the team:
 - Ask your coach to prepare SAFE-related remarks to present during team huddles/meetings. For example, SAFE stories or a SAFE skill of the month review.
- Get the whole team involved:
 - Set a team goal related to SAFE practices each month. For example, "within the next two weeks, each of you is challenged to share how you used the STAR technique at work."
 - Allow the SAFE Coach to review pertinent information related to the goal to ensure all team members understand how they might be able to use the selected SAFE practice if they're unsure.

Next Steps for Leaders

Leader Accountability

- Tell **SAFE Stories** at your meetings.
- Practice **5:1 Feedback** with staff and peers.
- Conduct **daily departmental huddles** in your area(s) (*24hr look back, 24hr look ahead, involve all, reference leader resources on SharePoint*)
- Practice **Round to Influence** technique, preparing for staff reinforcement.
- Protect those who **Speak-Up for Safety**.
- Utilize the **Performance Management Decision Guide** to address preventable errors.
- Ensure your department has a **SAFE coach**, meet regularly.

Leading your Team

- Set clear expectations for using the Universal Skills.
- Assist the interpretation of Universal Skills in their daily work.
- Consistently role model, reinforce and coach the Universal Skills.
- Support, engage department SAFE coach in huddles, rounding, etc.
- Empower others to submit SAFE events via SAFE Event Reporting.

Notes:

Multiple horizontal lines for writing notes.

