



# Action Collaborative Session 4: Community Debrief and Full Transfer Drill Preparation

March 12, 2024

# Financial Disclosures

- With respect to the following presentation, there have been no relevant (direct or indirect) financial relationship between the presenters/activity planners and any ineligible company in the past 24 months which would be considered a relevant financial relationship.
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# CME and CE Information

In support of improving patient care, this activity has been planned and implemented by Primary Maternity Care and Moses/Weitzman Health System, Inc. and its Weitzman Institute and is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME), the Accreditation Council for Pharmacy Education (ACPE), and the American Nurses Credentialing Center (ANCC), to provide continuing education for the healthcare team.

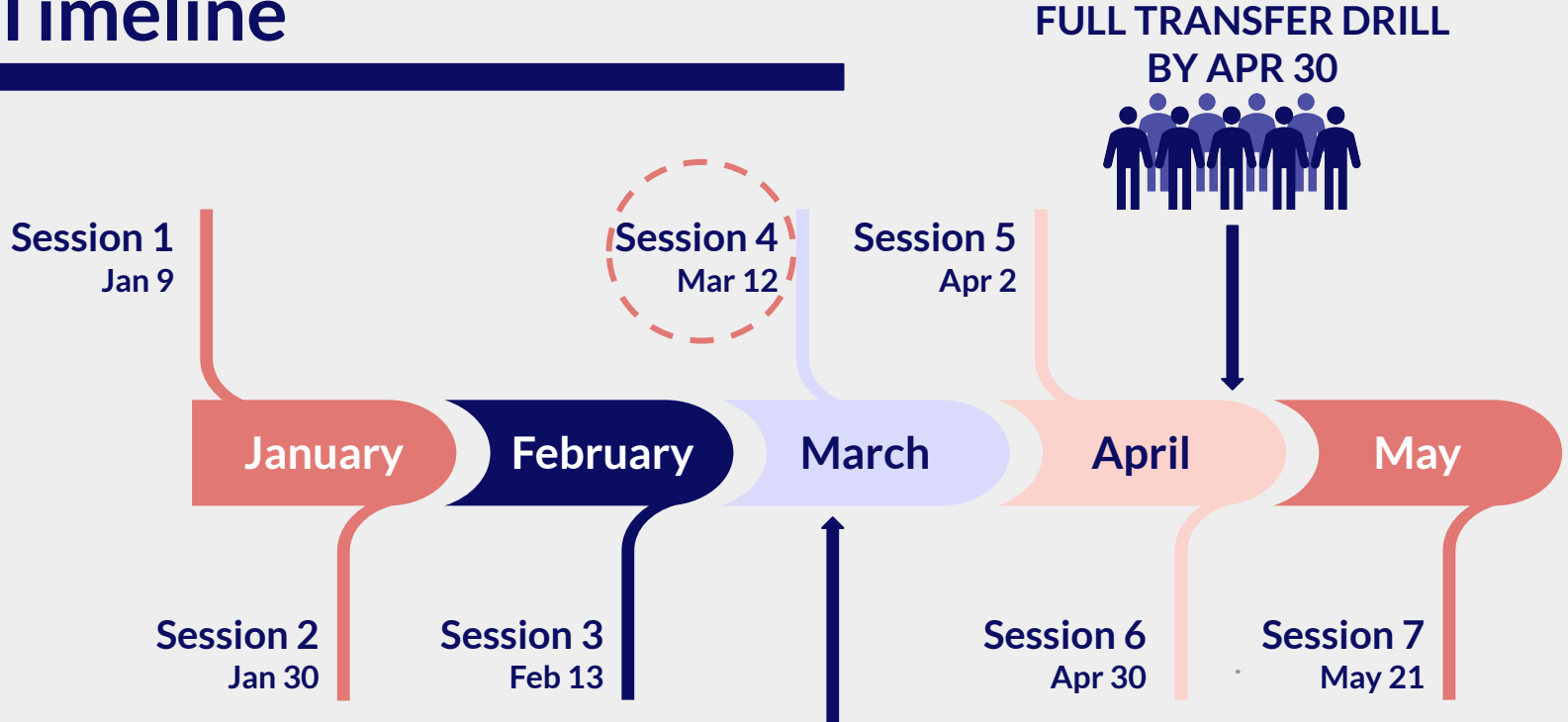
Through Joint Accreditation, credits are also available under the following body:  
American Academy of PAs (AAPA)



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INTERPROFESSIONAL CONTINUING EDUCATION



# Timeline



TEAM DRILL\*  
BY MAR 12



\*Option of mini-drill

All sessions at  
4:00 pm EST

# Action Collaborative Learning Objectives: Session 4

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- Discuss strengths, challenges, lessons learned, and areas for improvement in your practice's response to emergencies
- Identify the components of debriefing and articulate its value to quality improvement
- Determine necessary stakeholders within the community and collaborating facility to implement Full Transfer drill
- Have the tools to conduct a Full Transfer Drill

# Outline for Today

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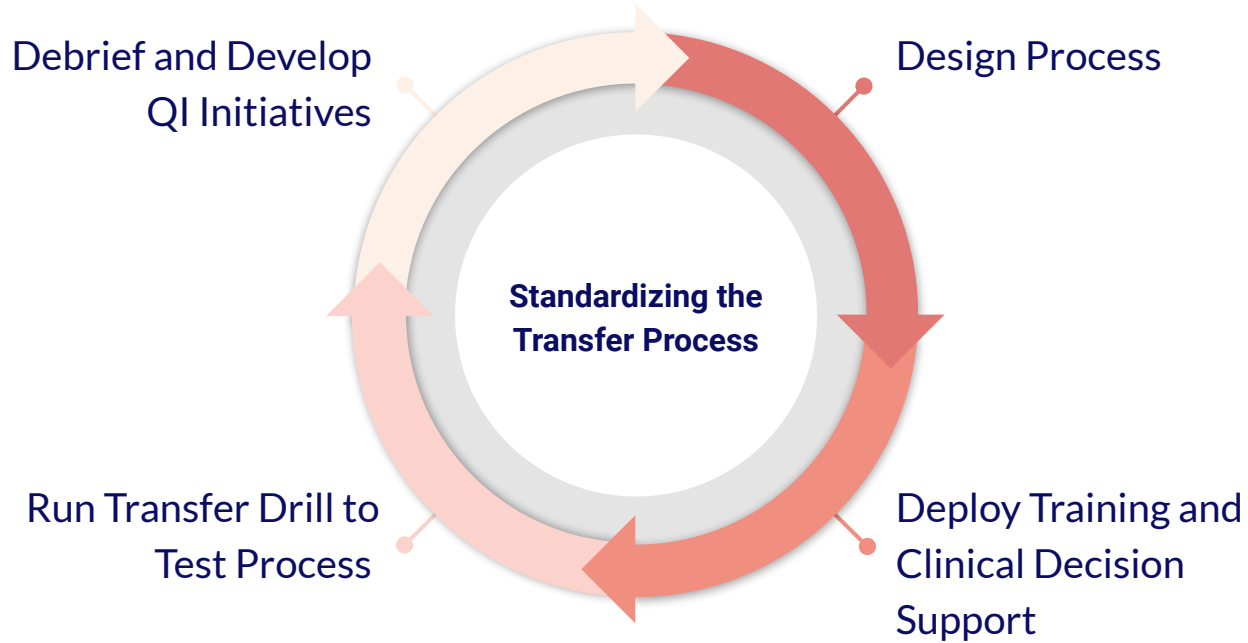
- Breaking Down Debriefing
- Debriefing your drill!
- Preparation for Full Transfer Drill
- Sharing / questions

\* When speaking, or posting in chat, please remind us what practice you are in and your role! Let's get to know each other!



# Breaking Down Debriefing

# Step Up Together Improvement Cycle





# What is Debriefing and Why Do it?

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- Hear and integrate different perspectives
- Reinforce good practices
- Translate learning into change/improvement
- Build teamwork
- Quality Improvement:
  - Identify a process or system that needs attention
  - Assign team member or group to create solution and choose a QI process
  - Close the loop, train for new processes, and follow-up



**Let's Debrief Your Drill!**

# Share Your Experience!

## DEBRIEFING AND ACTION PLANNING GUIDE

Review the checklist of observed behaviors as a team and discuss subjective assessments such as communication style with team members and family, role clarity, and effectiveness at clinical tasks.

### Reflection Questions

- **What happened here?** Ask 1-2 people to give a brief high-level summary so everyone's on the same page.
- **What went well?** Give everyone a chance to share the good stuff they noticed before critiquing.
- **What needs attention or improvement?** Try to focus on processes and systems, not assigning blame.
- **Are there other appropriate ways to manage this emergency or transport?** Consider different approaches such as who might accompany the patient, dyad vs. separate transfers, etc.
- **Were we prepared for this emergency?** The answer will help clarify the Action Steps.

### Action Steps

- **What changes are needed to processes or procedures?** Make sure to assign someone to follow-up on the change.
- **How should this emergency be documented in the medical record?** Discuss any documentation standards and tools such as order sets or dot-phrases available to clinicians.
- **What other reporting is required for this emergency transfer?** This could include accreditation or licensing bodies, malpractice carriers, and internal organizational reporting.
- **What other follow up would be expected after this emergency?** Consider follow-up for patient/family or staff, or other next steps.

## Let's Debrief:

### Debriefing Questions

#### What happened?

Give just a brief, high-level summary so everyone's on the same page.

#### What went well?

Give everyone a chance to share the good stuff they noticed before critiquing.

#### What needs attention or improvement?

Try to focus on processes and systems, not assigning blame.

#### What should we do differently going forward?

Make sure to assign someone to follow through on the change.



Primary Maternity Care



# Preparing for Full Transfer Drill

# Reminder of why we are doing this...

“We recognize this as an incredible opportunity to establish best practices not just for [our institution] but for integrated systems between hospital and community across our state and country.”

“It is imperative to not only provide support to them [birth centers] but to practice collaboratively with them.”




“When hospitals partner with birth centers, we can provide patients with choice of provider and extend the range of services offered to the community.”

“The time and expertise given through this collaborative will help [our city] keep community birth a safe option and **the time is now!**”



knowledge  
community  
organization  
momentum learning  
insight balance communication  
collaboration  
confidence power intrigue  
improvements  
consistency fellowship  
ideas  
coordination tools

# Preparing for Full Transfer Drill

Type of Drill	Who's Involved	Planning Needs
 Mini Drill	Solo, two-person team, any small group	Can be impromptu, e.g. conducted on shift with available staff, during orientation, or as a "station" in a skills practice day.
 Team Drill	Full team from practice/facility	Schedule in advance at regular times, compensate time to participate.
 Full Transfer Drill	Full team plus transport and/or hospital personnel	Requires coordination and advanced planning with community midwifery, EMS, and hospital teams.

*\*Ideally completed by April 30*

Who are you involving?

What challenges are you facing?

Resources:

- Toolkits
- Course site and discussion board
- Coaching sessions
- In-person visit

# Common questions/concerns

- **Potential timeline / Steps**
  - Select Drill Implementation Toolkit
  - Identify stakeholders and agree on running full transfer drill
  - Schedule date (likely 3-4hrs for full process) and notify/block time for all participants/necessary staff
  - Gather supplies, block calendars/schedules
  - Drill coordinator(s) to review toolkit in depth and identify drill roles
  - Day-of preparation and introduction of team to case and roles; ensure all necessary parties are aware of drill
- **Day-of expectations**
  - Run scenario once.
  - Maintain high fidelity which can be a little uncomfortable and anxiety-producing
  - ~3-4hrs from set-up to debrief
  - Consider ways to compensate staff for their time
  - Complete Drill Reporting Form!
- **How to participate/engage as an observer**
  - Consider filming or having Zoom link open for participants to join and observe each phase.



**Questions??**



# Additional support

- Course Learning Platform
  - Discussion board
  - Resource Library
- How to schedule consulting hours (2 sessions / team)
  - See [course site](#) for scheduling!
- On-Site Support
  - PMC team travels to your city - funding available for ~3 locations
  - Fill out our brief [application](#) if you are interested in on-site support!



Tools



Community



Coaching

# Weitzman Info

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Reminder to collect your 7 CEs!

1. Visit the [Weitzman Institute Education Platform](#) and create an account
2. **Register for** the [Step Up Together Action Collaborative](#). Once you register, you will be automatically enrolled in all seven sessions and will see a list of those sessions.
3. You can access the zoom links for each session under the **Overview** tab in the specific session activity.
4. Complete the post-session evaluation after the Zoom session has ended, claim credits, and download your session certificate.

