Building a Clinician Support Program
Assessment Worksheet/Planner

This working document can be used as a roadmap for implementation of a clinician support program. Using the document will help ensure that action items are completed and in place for clinician support deployment.

There are a total of six sections within this worksheet that address necessary support elements needed for a clinician support response team deployment. Many of these activities can be addressed simultaneously. By completing each section, your institution will be prepared to deploy your own support team.

These six sections include: 1. Internal Patient Safety Culture Preparedness
2. Identify Existing and Potential Second Victim Supporters
3. Establish Team Infrastructure
4. Develop Internal Marketing Campaign for Response Team
5. Establish Training Program for Second Victim Supporters
6. Ensure Team Effectiveness

Clinician Support Program Deployment Objectives:
* Identify executive champion(s) and key individuals to help deploy a second victim support program.
* Determine the best strategies for clinician support for your institution.
* Develop an infrastructure to ensure effective support program deployment.
* Deploy a facility specific plan to provide interventional support and guidance for clinicians suffering as second victims.
* Outline a communication/marketing plan to ensure clinician awareness of offered services as well as how to access services.

Each section includes a basic overview of what needs to be accomplished with some leading questions to aid in your planning process. When applicable, examples and tips for proceeding with action step have been provided.

> **Tip:** Watch for the icon under the MITSS Toolkit (Resources) column. This icon represents examples that are available for your use from support programs around the United States. Individuals designing their own team are encouraged to use these documents as springboards for their individual policies, etc.

1. Internal Patient Safety Culture Preparedness

An initial step for implementation of a clinician support response team is to ensure that the organization's culture for patient safety is strong and solid.

- Assessment of your internal patient safety culture is an essential first step to ensure institutional readiness for second victim support.

- Assess patient safety culture to evaluate if patient safety events are viewed as opportunities to learn about system vulnerabilities and human factors.

Patient Safety Culture Assessment				
Action Steps	Existing Resource	MITSS Toolkit (Resources)	Organizational Assessment and Actions	Responsible Individual(s)
1. Adverse Safety Event Investigation Process Clearly Delineated -What type of organizational response plan is available for serious patient safety events? -Is there an adverse event policy in place? -What is your reporting culture like? -Do you have an event investigation process clearly outlined? - Does your facility review patient safety events openly and share lessons learned? -Do you openly share case findings?	Yes No	Policies, Procedures, and Practice 51, 52 50 1 44,95	Policies Regarding Adverse Events =	
2. Reporting Culture -Policies in place to support the reporting of adverse clinical events? -Does your facility review patient safety events openly and share lessons learned?	Yes No	Internal Culture of Safety 44,45	Culture 'readiness' assessment =	

2. Identify Existing and Potential Second Victim Supporters

As health care providers, most clinicians have an innate ability to nurture and help others. Some individuals within your institutions perform this function on a daily basis.

- Obtain an overview of existing resources within your facility AND community to determine those individuals who could serve on a steering team to implement a support network within your institution.

Personnel Resource Assessment				
Action Steps	**Existing Resource**	**MITSS Toolkit (Resources)**	**Organizational Assessment and Actions**	**Responsible Individual(s)**
1. Identify key individuals who routinely assist others during times of crisis *- What type of organizational response plan is available for serious patient safety events?* *-Are individual areas already doing this?* *-Is there a predictable plan already in place?* *- What internal resources are currently in place at my health care facility that could address second victims?* *-Who is currently working within our facility that has a skill set to support an individual in crisis?* Examples of individuals may include: social workers, clergy, EAP, Mental Health Workers, HR/Personnel, etc. Hint: Consider existing resources in your health care facility that already provides support. Look at both formal and informal support.	**Yes No**	 7, 24 14 55-60 64	Existing Support Mechanisms in Place = 'Natural' Clinician Supporters include =	

Action Steps	Existing Resource	MITSS Toolkit (Resources)	Organizational Assessment and Actions	Responsible Individual(s)
2. Formalize the role of the second victim support project team lead. Identify someone who is passionate about the need to support clinicians and who has strong leadership skills.	Yes No	Operational 70,75	Second Victim Support Team Lead Role Expectations =	
3. Identify Executive Champion for Support Network. Some teams have several executive champions representing clinical and non-clinical areas. *-Who should be the executive champion?* Example of potential executive champions may include: CMO, CNO, CQO, HR/Personnel Director, etc.	Yes No	Leadership Buy-In 31	Potential Executive Champion(s) =	
4. Form a Multi-Disciplinary Advisory Group to assist with team design and deployment. -Who should I invite to participate on the advisory group? Example of potential group members include EAP representatives, Chaplains, Social Workers, Employee Wellness Personnel , Risk Management, Patient Safety, Palliative Care Team, Clinicians, and administrative leaders.	Yes No	Formation of Multi-Disciplinary Group 14 - 25		

3. Establish Team Infrastructure

Second Victim Response program infrastructures will vary from facility to facility based on personnel resource availability. Each facility should design a team that is responsive to their local needs and assets. To ensure optimal team performance, it is important to have an infrastructure in place to ensure second victim supporters are aware of performance expectations. It is also important for clinicians to know what they can expect as institutional support for themselves or their colleagues.

- Design your team structure based on perceived needs of clinicians within your health care facility. (Some organizations may have information on clinician support needs based on organizational or department/unit assessment surveys.)

- Ensure that policies and procedures delineating the second victim response team program are readily available to all clinicians. Clinicians need to know what to expect in the aftermath of a serious patient safety event.

Team Infrastructure Design				
Action Steps	**Existing Resource**	**MITSS Toolkit (Resources)**	**Organizational Assessment and Actions**	**Responsible Individual(s)**
1. Define a team structure. Team structure will vary based on your organization. *- Who should be represented on our facility's support team?* *-What will the team structure look like?* *-Who should we recruit for this team?* *-What are their roles?* Examples of team structures include: trained peers, hired counselors, one responder for all events, EAP, clergy, etc.	**Yes No**	Operational 75 83 77	Team structure ideas =	
2. Determine mechanism for providing second victim support to individual clinicians as well as entire care teams. *-What is the best way to organize our team?* *-How will we provide supportive services to an individual colleague in distress?* *-How will we provide supportive services for an entire team of clinicians?* *-Who will provide support?*	**Yes No**	Operational 55 – 61 69 - 71	Provision of support – individual clinicians = Provision of support – entire teams =	

Action Steps	Existing Resource	MITSS Toolkit (Resources)	Organizational Assessment and Actions	Responsible Individual(s)
3. Define activation guidelines for second victim support for both individual clinicians <u>and</u> entire teams. *-How will second victim support activations occur within your facility?* *<u>Ideas</u> – pager, peers embedded within high risk areas for instantaneous activation, house supervisor activation, self-help phone line, etc.*	**Yes No**	Operational 72	Activation Ideas =	
4. Develop a proposed budget for implementation of a support service. (Dependent on team composition, on call considerations, expansion of an existing role, etc)? *-How much will it cost to implement a support structure?* *-What are some incidental expenses to support a team? (pager, training, marketing materials, brochure development, on-call expenses, etc.)*	**Yes No**		Special Budget Considerations =	
5. Develop an executive summary business plan for implementation of a support team infrastructure, budget, timelines, and responsible individuals.	**Yes No**		Ideas for inclusion in business plan =	
6. Seek administrative approval for proposed team structure.	**Yes No**		Who needs to approve =	

Action Steps	Existing Resource	MITSS Toolkit (Resources)	Organizational Assessment and Actions	Responsible Individual(s)
7. Develop operational plans for second victim response team. *-What needs to be operationalized prior to official team deployment?*	**Yes No**	Dissemination/ Communication Plan 86 - 98	Ideas =	
8. Develop timeline for second victim response team deployment. *-Outline a proposed timeline for team deployment.* *-May consider target implementation date and align action items accordingly.*	**Yes No**		Target Implementation Date = _____	
9. Formalize the process for providing immediate access to experienced counselors when necessary. **-***What mechanism should we implement to ensure prompt referral to professional counseling services when it is indicated?* *-How can we ensure a fast track referral for individuals requiring professional assistance?*	**Yes No**	Operational 72, 73	Ideas for developing a prompt referral method =	
10. Develop policies and procedure for team function. *-Identify team objectives and goals.* *-Delineate team member role, responsibilities, and obligations by developing a job description for supporters.*	**Yes No**	Operational 79	Team Objectives & Goals =	

Action Steps	Existing Resource	MITSS Toolkit (Resources)	Organizational Assessment and Actions	Responsible Individual(s)
11. Develop a strategy for ensuring second victim support resources for cases that are problematic or need additional guidance/insights. -*What resources are available to mentor supporters with case concerns?* Examples include: Risk Manager, Patient Safety, Clinical Leaders, etc. -*What safeguard should be in place to facilitate adequate support debriefings for complicated cases?* -*Who can provide this type of guidance to our supporters?* -*What mechanism can we use to de-brief the supporters?* Hint: Potential individuals may include individuals skilled in counseling such as chaplains, EAP, counselors, etc.	Yes No	Learning and Improvement Opportunities 99 99 99	Key resources who can help support/guide the second victim response team when they need a 'shoulder'=	
12. Recruit team members -*Who should be on the support team?* Hint: Ensure 'ready access' support for clinicians in high risk clinical areas and teams. Possibly consider embedding individuals knowledgeable about second victim phenomenon and supportive strategies on teams.	Yes No	Operational 74	Second Victim Supporters should include =	

4. Develop Internal Marketing Campaign for Response Team

Institutional awareness of second victim's needs and interventional support strategies should be readily available to all clinicians.

- Assess your health care facility for opportunities to showcase information regarding the second victim phenomenon as well as identify available interventional support strategies for clinicians in the aftermath of an unanticipated clinical event.

Internal Marketing Plan				
Action Steps	Existing Resource	MITSS Toolkit (Resources)	Organizational Assessment and Actions	Responsible Individual(s)
1. Develop second victim awareness strategy for facility-wide dissemination. *- How do we inform clinicians about the second victim experience?* *-What types of activities can occur to inform clinicians of second victim phenomenon and supportive interventions at my facility?* *- How can we communicate this new program to our clinicians?* Examples: Health fairs, employee wellness forums, newsletters, screensavers, etc. Hint: Potential partners for this action item include education and development staff, marketing/PR staff, etc.	**Yes No**	 Dissemination/ Communication Plan 89 – 98 73 89 - 98	Individuals to convene to plan an educational awareness campaign =	
2. Identify clinical areas which are at high risk for evoking a second victim response within your facility. *-What are high risk clinical areas within my health care facility?* Hint: Potential high risk clinical areas include ER, ICU, OB, pediatrics, oncology, etc. An additional way to identify high risk clinical areas is to work with your facility's risk manager. Incident reporting systems or employee safety surveys may yield valuable information regarding high risk clinical areas.	**Yes No**		High risk clinical areas at my facility =	

Action Steps	Existing Resource	MITSS Toolkit (Resources)	Organizational Assessment and Actions	Responsible Individual(s)
3. Identify high risk clinical teams that should be monitored closely by supervisory personnel for evidence of second victim experiences. *-What are high risk clinical teams within my health care facility?* Examples of high risk clinical teams may include ambulance crews, helicopter services, Rapid Response Teams, Code Blue Teams, Pediatric oncology, etc).	Yes No		High risk clinical teams at my facility =	
4. Embed second victim surveillance strategies into routine clinical efforts for high risk teams. *-What are some opportunities that we can use to monitor staff for concerns?* Examples: Establish 'real time' methods for assessing clinicians for second victim experiences during routine tasks such as team huddles, post activation code de-briefings, shift hand-offs, etc.	Yes No		Opportunities to incorporate second victim 'checks' at my facility include=	
5. Develop an informational brochure on the second victim phenomenon and your response team. *- What marketing strategies should be used to ensure that clinicians are aware of this resource?* *-What information can we provide to second victims as a resource for them?* Hint: Consider including information about the second victim phenomenon. Provide self-care and stress management tips. Consider an 'easy to access' option for second victim resource information, such as an intranet site, close to time clocks, etc.	Yes No	 Dissemination/ Communication Plan 89 – 98 101	Key Information to Include =	

Action Steps	Existing Resource	MITSS Toolkit (Resources)	Organizational Assessment and Actions	Responsible Individual(s)
6. Identify various facility-wide and department specific meetings to introduce the concept of second victim and information regarding your second victim response team. *-What meetings and/or committees need to include information on the second victim phenomenon and our response team?* *-How fast can I get on committee agendas to discuss the second victim phenomenon?* *Hint:* Consider offering educational sessions as part of patient safety grand rounds, risk management sessions or new staff orientation.	**Yes No**			
7. Develop 'just in time' tools to help clinicians/supervisors contact the second victim response team. *-How can we advertise the second victim support services?* Hint: Develop various second victim support awareness tools to ensure clinician awareness. Examples for marketing strategies include: screensavers, magnets, brochures, pamphlets, etc.	**Yes No**	Dissemination/ Communication Plan 89 – 98	Ideas for ensuring that clinicians are aware of the second victim support resources include =	

5. Establish Training Program for Second Victim Supporters

Even though health care clinicians tend to have innate caring and nurturing skills, it is still important to provide them with additional information so that they can satisfactorily function in the role of Second Victim Supporter.

- Formalize training/education necessary for second victim supporters throughout your health care facility.

- Develop an initial training program for second victim supporters as well as ongoing educational activities.

Educational Design Strategy				
Action Steps	**Existing Resource**	**MITSS Toolkit (Resources)**	**Organizational Assessment and Actions**	**Responsible Individual(s)**
1. Identify internal resources that could assist in initial second victim supporter training program. *-Who can assist with coordination of training programs for the second victim supporters?* Examples of possible resources include: staff educators, nurse managers, counselors, EAP personnel, paramedics with Critical Incident Stress Management training etc.	**Yes No**	Operational 86 – 87	Available resources for education =	
2. Develop reference tools to be used by members of support team. *-What information should be readily available to support team members?* Examples: Team manuals should include information that the second victim support team needs to complete their tasks. Minimal information should include: Contact numbers for other team members. Information on referrals to professional counseling resources. Checklists for response activations, etc. Hint: An annotated bibliography of second victim literature is a useful resource to have readily available.	**Yes No**	Learning and Improvement Opportunities 99	Information to have available to support team members =	

Action Steps	Existing Resource	MITSS Toolkit (Resources)	Organizational Assessment and Actions	Responsible Individual(s)
3. Design second victim support training. -*What is the best way to educate second victim response team members on 3 main areas?* *(a)second victim phenomenon,* *(b)providing supportive care following an unanticipated clinical event* *(c) Fast track referral to professional counseling services* -*Who can educate on these topics?* -*What basics skills should be covered during the initial training?* - *What type of ongoing education should be available to our second victim supporters?* Hint: Minimal skills include active listening, crucial conversations, stress management techniques, crisis intervention and indications for professional counseling needs.	Yes No	Dissemination/ Communication Plan 86 – 87	Topics/Presenters =	
4. Develop a plan to address ongoing continuing education for members of the second victim support team. -*What is the best way to provide continuing education to the support team?* Examples: monthly meetings with case reflections, guest speakers, crisis intervention timely topics, etc.	Yes No	Learning and Improvement Opportunities 99	Training Considerations Beyond the Initial Education =	
5. Develop an ongoing plan to evaluate educational needs of response team members. -*How can I be sure that our education has met the needs of the second victim response team?* -*How can I monitor on-going educational needs of the second victim response team?*	Yes No	Learning and Improvement Opportunities 99	Evaluation Ideas =	

6. Ensure Team Effectiveness

Implementation of any new program requires administrative surveillance to ensure that the second victim support program is functioning as designed with optimal outcomes.

- Develop a surveillance methodology to determine effectiveness of second victim support program.

Team Performance Measures				
Action Steps	Existing Resource	MITSS Toolkit (Resources)	Organizational Assessment and Actions	Responsible Individual(s)
1. Develop an encounter form to capture general information regarding team activations. *-How will I be sure that our team efforts are positive?* *-What data do I REALLY need to know about the encounter?* Hint: May want to consider a link for second victim support within an electronic event reporting system.	Yes No	Learning and Improvement Opportunities 99, 100	Ideas for outcomes measures=	
2. Establish a dashboard overview of general team performance for administrative review and surveillance. *-How will I develop information in a meaningful way?*	Yes No		Dashboard elements to include=	
3. Develop an evaluation tool for second victims to complete to assess team effectiveness. *-What are some basic elements of information that we need from second victims to ensure that their needs are effectively met?* *-What is a mechanism that we could attain second victim feedback while also maintaining their privacy?*	Yes No	Learning and Improvement Opportunities 100	Data elements identified =	

Action Steps	Existing Resource	MITSS Toolkit (Resources)	Organizational Assessment and Actions	Responsible Individual(s)
4. Develop a team member satisfaction tool. -How will I measure team satisfaction? -How can I assure that team member's needs are addressed?	Yes No	Learning and Improvement Opportunities 100	*Ideas for monitoring support personnel's satisfaction=*	

Additional Notes/Ideas