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Pocket book for simulation debriefing in healthcare

Denis Oriot, MD, MSc, PhD

Professor of Pediatrics, Pediatric Emergency Department, University Hospital of Poitiers, France

Academic advisor in simulation, Simulation Laboratory, ABS Lab, Faculty of Medicine, University of Poitiers, France

denis.oriot@univ-poitiers.fr

Guillaume Alinier, PhD, MPhys (Hons), PGCert, MInstP, MIPEM, SFHEA

Director of Research, Hamad Medical Corporation Ambulance Service, Doha, Qatar.

Professor of Simulation in Healthcare Education, School of Health and Social Work, University of Hertfordshire, Hatfield, UK

Visiting Fellow, Faculty of Health and Life Sciences, Northumbria University, Newcastle upon Tyne, UK

UK Higher Education Academy National Teaching Fellow (2006)

g.alinier@herts.ac.uk

Foreword

Debriefing is the foundation for effective simulation-based education. Simulation events provide opportunities for practice and rehearsal, while debriefing provides a forum for active discussion and learning. During debriefing, learners work with facilitators to reflect on their performance and unpack behaviours, leading to a better understanding of the underlying rationale behind these behaviours. In the ideal world, mutual reflection and discussion during debriefing lead to meaningful learning that positively impacts change in performance in the clinical environment. To ensure this translational effect occurs on a regular basis, simulation programs must ensure that simulation educators have the knowledge and skills necessary to effectively conduct debriefings.

Healthcare simulation is a rapidly advancing field and our collective knowledge of debriefing as an educational tool is growing alongside this field. Many educators that came into healthcare simulation years ago may have learned one method of debriefing as their "go-to" method. In the past few years, new methods, models, and frameworks have emerged that have challenged traditional thinking. Some debriefers may have learnt that video is a valuable resource that should always be used during debriefing yet recent studies have suggested limited value for the use of video review during debriefing – so what are debriefers to do? While most debriefings may proceed smoothly, sometimes difficult situations arise with learners who are upset, frustrated, or angry. What strategies can debriefers use to manage these situations? While debriefings have been traditionally viewed as an event occurring after the simulation scenario, new research supports shorter feedback conversations spaced throughout the scenario. When should this design be used in favour of the traditional post-event debriefing? Many more additional questions occupy the thoughts of debriefers as they navigate the waters of simulation-based education and debriefing in their daily practice. A comprehensive resource for debriefing is required to support day-to-day debriefing activities.

The Pocket Book for Simulation Debriefing in Healthcare offers a thorough review of the simulation debriefing literature in an accessible, reader-friendly format. Authored by leading international simulation experts, Dr. Denis Oriot and Dr. Guillaume Alinier, this book shares valuable tips and tricks that can help novice debriefers to acquire new skills and expert debriefers to hone their craft. Chapter 1 provides an introduction to debriefing by describing various key components to debriefing – the purpose of debriefing, who should be debriefing, when and where debriefing should occur, and the various different types of debriefing. Chapter 2 builds on existing content by outlining specific strategies to conduct an effective debriefing. Chapter 3 offers advice on several common debriefing-related issues, such as difficult debriefing, the use of video, the use of time-outs during the scenario, confidentiality, and the assessment of debriefing quality. Lastly, Chapter 4 provides opportunity for self-reflection; so readers can place what they've learned from the book in context with their own personal experiences as a debriefer. Taken as a whole, the pocket book represents a go-to resource for simulation educators wishing to improve their performance as a debriefer. By addressing common and important issues for debriefers in this book, Dr.'s Oriot and Alinier have supported

the development and advancement of our field. I look forward to hearing success stories from debriefers around the world!

Adam Cheng, MD, FRCPC, FAAP, FSSH

Associate Professor, Departments of Pediatrics and Emergency Medicine, Cumming School of Medicine, University of Calgary, Canada

Attending Emergency Physician, Section of Emergency Medicine, Alberta Children's Hospital, Canada

Scientist, Alberta Children's Hospital Research Institute, Canada

Director, KidSIM-ASPIRE Simulation Research Program, Alberta Children's Hospital, Canada

Preface

We met for the first time at the 7th European Congress on Emergency Medicine in 2012 in Antalya, Turkey, having been invited by the conference organisers with a few other simulation educators to run a faculty development workshop, but the idea of this pocket book emerged from another simulation workshop we ran in early 2015 in Qatar for clinical educators of various specialties from across Hamad Medical Corporation and during which we were both talking to the participants about the importance of debriefing and the various approaches that exist. Our international co-faculty suggested we should actually write a book on this topic and we agreed to take on the challenge. Our objective was to develop a book that is relatively concise, easy to read, and would be a helpful resource to educators with an interest in debriefing or wanting to learn more about this pivotal topic.

Simulation has gained an increasingly important place in medical education over the past couple of decades, but we think debriefing deserves a particular focus as it is a very special time shared by facilitators and their learners. This asymmetrical verbal exchange between one who “knows” and one who “learns” looks like a Socratic discussion that requires knowledge in communication, management of psychological reactions, understanding of clinical situations and their (preferably “evidence-based”) management, and specific skills to run a "good" debriefing. Nevertheless, the fantastic variety of clinical cases, of educational situations, of personalities, of cultures, make debriefing a new challenge every time it has to be performed or facilitated, even for the more seasoned debriefers. Debriefing facilitators often wonder where to start, how to handle this, how could this have been missed? Both of us also know the risk of a "bad" debriefing, how it could be counterproductive, or even dangerous from a relationship perspective. This is why we thought that, with our respective experience in debriefing, it would be worthwhile to create a pocket book to help novices and beginners in debriefing to find their way in this moving field of communication in education. This book may also be of interest for clinicians or educators who have been using debriefing for several years but want to broaden their views on this specific subject and gain the insight from other professionals in the field.

In a first chapter we explore the basic foundations of debriefing per se, its place in simulation-based training, and its relation with prior briefing of the learners or the introduction they should receive about the simulation process and the environment and equipment orientation. The second chapter covers the practical aspects of debriefing such as its general structure, how to facilitate the various phases of a debriefing and why they should exist, and which investigational techniques can be used to close performance gaps. The third chapter covers general tips and specific issues around debriefing such as how to prevent or handle difficult debriefings. This chapter is not exhaustive by any means since a fair amount of research is still underway on this subject aiming to improve the benefits of debriefing for the learners. For the final chapter, we expect you to be a reflective contributor to this pocket book. The blank pages are meant to be used for your personal reflections as a debriefer. It will hopefully become your diary so you can log important learning episodes. These may be great debriefing examples that

you would like to remember forever or epic debriefing failures from which you have learnt something crucial. We expect this section to be useful in the present and the future of someone's development as a refined debriefer.

We sincerely hope you will find this pocket book user friendly and consider it as a valuable companion to prepare yourself to facilitate successful debriefings with your colleagues and for your learners.

Guillaume Alinier and Denis Oriot

Acknowledgements

We are mutually thankful for having diligently collaborated in writing this pocket book in a very complimentary manner (both wearing multiple hats, but one author being primarily an educator and the other one being first of all a physician) and mostly without clear assignments! We could feel some sort of implicit and natural symbiosis throughout the development of this pocket book despite limited direct interactions and working in different continents, and this is the final result.

We are really appreciative of the insight gained over the last couple of decades of our professional careers regularly facilitating scenario-based simulation education in various settings and with learners of a wide range of experience and from various professions and specialties. Much of these opportunities have either been bestowed upon us as trusted faculty to run invited workshops internationally for or with fellow educators, clinicians, and learners, or thanks to the willingness and flexibility of our respective academic and clinical employers to support our passion and aspirations in relation to simulation-based education in healthcare. Much of the experiences are directly reflected in this pocket book in a more or less implicit manner so we are grateful to the people who inspired us, either as role models or as anonymous discussion subjects!

Last but not least we are also particularly grateful to our respective families who support us in all possible ways in our educational and academic endeavours, and especially our spouses; Nandini and Marie-Line, our children; Guillanam, Prillanam, Caroline, Annelise, Benjamin, Elsa, Melissande, as well as our parents who we will always strive to make proud. Thank you for your patience with us and for not being too jealous of our computers!

Guillaume Alinier and Denis Oriot

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List of Abbreviations:

ABC: Airway, Breathing, Circulation

CPR: Cardiopulmonary Resuscitation.

CRM: Crisis Resource Management

DASH: Debriefing Assessment for Simulation in Healthcare

DEBRIEF: Defining, Explaining, Benchmarking, Reviewing, Identifying, Explaining, Formalizing

DML: Debriefing for Meaningful Learning

GAS: Gather, Analyse, Summarise

GREAT: Guidelines, Recommendations, Events, Analysis, Transfer

IO: Intraosseous

LEARN: Learning objectives, Emotions, Actions, Reflection, Next steps

OSAD: Objective Structured Assessment of Debriefing

PEARLS: Promoting Excellence And Reflective Learning in Simulation

RCDP: Rapid Cycle Deliberate Practice

RUST: Reaction, Understanding, Summarise, Take home message

CHAPTER 1: Introduction to debriefing

Abstract:

Debriefing is a crucial aspect of simulation-based educational interventions in healthcare. This section of this pocket book aims to clarify what debriefing is really about and why it is such an important aspect of the learning process for everyone involved: participants, simulation observers, and facilitators alike. It also places emphasis on the aspect of briefing as a phase that sets foundation for a successful debriefing so learners understand the approach adopted and what will be expected from them during that phase and its purpose. The many other critical aspects around the practicalities of debriefing, which are "the what, who, when, where, and how to debrief are individually explored to provide clear advice with support of relevant references. Of notable importance in this section is the clear description of the most common education performance review approaches (Directive feedback, Plus/delta, After action review, Structured debriefing, …) so the most appropriate one can be selected depending on various parameters such as the learning objectives being addressed, the level of expertise of the participants, and the time available.

1.1. Definition of debriefing

Debriefing can be seen as a facilitated reflection encounter based on an experiential learning episode (Fanning & Gaba, 2007). More precisely debriefing is a facilitated "post-event analysis" encounter also generally defined as a "learner-centred technique, non-offensive, in order to help a professional or a team to improve one's performance by a reflective practice" conversation (O'Donnell et al., 2009). We should acknowledge that the "learner-centeredness" may be dependent on the type of activity being debriefed, the learner type and their culture, and the actual purpose of the debriefing. It is a very valid process to engage in with participants following any type of simulation or learning activity irrespective of the modality adopted (Alinier, 2007), highlighting the fact that they do not necessarily have to be experienced as the aim might be for them to actually gain experience from undertaking the activity and through a directly or indirectly guided reflection process. The notion of direct or indirect guidance can be defined as depending on whether or not someone is facilitating the process or if learners are relying on a model or framework provided to them for self-debriefing, auto-feedback, or peer-feedback. Depending on the debriefing approach adopted, the process may help uncover mental models to which behaviours and cognitive reasoning can be attributed to. These can then be corrected or enhanced to improve future performances.

The most common debriefing processes involve "the active participation of learners, guided by a facilitator or instructor whose primary goal is to identify and close gaps in knowledge and skills" (Raemer et al., 2011). The level of facilitation or degree of involvement of the educator or mentor depends on a number of factors which will be considered mainly towards the end of section 2.6. Real life events can as much form the basis of a debriefing as a planned experiential learning episode, although the circumstances, organizational culture, and implications may impact very differently on

the dynamics and openness of the discussion, but this is not going to be the focus of this book.

Debriefing is potentially a very powerful and effective communication exercise aimed to improve performance (Levett-Jones & Lapkin, 2014). It predominantly remains an asymmetrical communication process between a facilitator and a learner, whereby one is often perceived to know and the other one learns. This is why the quality and type of interaction between the debriefer and the participants at the time of debriefing is crucial for the learning process to occur effectively. There is a correlation between the competence of the debriefer perceived by the learner and the perceived quality of the simulation experience (Helmreich & Wilhelm, 1991). Debriefing is a complex task, full of psychological and educational nuances that are too often underestimated and can potentially significantly affect its educational impact.

It is said that the debriefing component is an essential part of the simulation learning process that should never be omitted (Rothbeg, 2008) or even that "simulation is the excuse for debriefing" (Gardner, 2013; Weinstock, 2013), therefore simulation should never exist without some form of debriefing! Other debriefing proponents state that "simulation without including adequate debriefing is ineffective and even unethical." (Kriz, 2008). According to Dieckmann et al. (2009), "the post scenario debriefing is important to maximize learning and facilitating change on an individual and systematic level, modifying for the better one's attitudes, perceptions, behaviours, actions or technical skills, or the organization's culture, policies, procedures or operational mechanisms", or even that "without a post-event reflective process, what the participants have learned is largely left to chance, leading to a missed opportunity for further learning, and making the simulation encounter less effective." (Motola, Devine, Chung, Sullivan, & Issenberg, 2013). At the very least some form of feedback needs to be provided to learners as is often the case with computerised or virtual reality task trainers and screen-based simulators (Kowalewski et al., 2016; Perkins, 2007).

Although readers may find other contextual applications, the focus of this pocket book will be around debriefing in an educational context, following mental or full-scale scenario-based simulation sessions rather than following purely skills oriented training sessions and real team or patient care events.

Furthermore, we will refer to "learners" to encompass the observers and scenario participants involved in the debriefing. Individuals who are or have been involved in a simulation scenario in particular will be referred to as "participants" at any stage of the simulation session. Other terms that will be regularly used in this book in contract to the learners, are the "faculty" in their various roles of the educational process supporting learners. In our view the "educator" is the broadest term relating to the individual whose primary concern is the development of another individual whilst taking into account the learners' needs and preference into consideration. Then comes the "instructor" who generally adopts a less learner-centred approach to teaching and who will primarily be involved in skills-based simulation activities. Another commonly used term in simulation-based education, is the "facilitator" who helps providing the learning opportunity or context to the learners without being seen in an instructor

Excluded from sample

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