

Huddle Quick Start Guide

What is a Huddle?

A **huddle** is a short meeting, 10 minutes or less, that typically occurs once at the start of the workday. In EDs and inpatient settings, there is a huddle at the start of each major shift. In clinics and the operating room, huddles happen once a day.

Why Huddle?

A huddle is an opportunity to review the safety performance of your unit (critical patients, line review), share important updates (room 4 is being painted and cannot be used, holiday PTO requests are due), celebrate successes and recognize peers.

Who Participates?

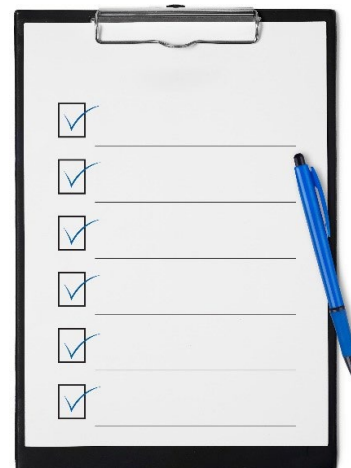
A shift huddle is a gathering of the nurses and certified nursing aides (CNAs) working together by unit and shift. It can be expanded to include other roles such as registration, management and administrators.

Who Leads?

Initially, the huddle may be run by the manager or charge nurse. Over time, it can transition to being staff-led.

Sample Agenda

- Give a warm welcome
- Introduce any new staff
- Provide an update on the unit
 - Patient volume*
 - Safety events in the last 24 hours
 - Mortalities in the last 24 hours
- Provide any essential departmental updates
 - Upcoming staff meeting, etc.
 - Reminders on proper blood culture technique
- Announce daily (or weekly) birthdays
- Open time for staff recognition



**Depending on the unit, some huddles will discuss every patient (ICU) while others will discuss by exception and only note the very critical patients (ED). Patient details shared in the shift huddle should be very brief and focused on risks and opportunities. This is not meant to be a handoff report.*

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Keys for Success

This is a short meeting. It must start and end on time. Everyone needs to be there on time and be prepared to participate.

Other Logistics

Shift huddles should occur for the oncoming shift prior to the off-going shift giving the handoff and leaving. This ensures that there are no gaps in patient care.

Any essential updates or key safety events should remain on the huddle for one week. This will ensure that all staff have an opportunity to read the huddle notes.

One strategy to ensure that the information presented is captured is to keep a notebook with a printout of main agenda points from each week's huddle. This will allow anyone who is late, on vacation or works a shift that doesn't align with the major shift times to review information that was presented in their absence.

Elevating Your Huddle

Visual management boards provide an at-a-glance visual of safety goals and workload. This display makes it possible for any unit staff member to understand what the unit is trying to accomplish and where they currently stand in meeting their goals.

If your department uses a visual management board, the huddle should be held around the board and include a review of it.

If you do not use a visual management board, consider one such as the Agency for Healthcare Research and Quality's [Visual Management Board Component Kit](#). See page 3 for an example.

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Daily Visual Management Board Example

1 Our Surgery Center
"Excellence in Safety: No Harm for Our Patients"

Today's Date:
14 March 2022

3 Number of procedures since last harm incident
1,635

Number of procedures since last near miss
245

2

Today's Pt Name	Procedure	Start Time	Safety Check
Sal Monday	B	7:00	◆
Mitsuko Michalak	A	7:00	◆
Estefana Younts	C	7:00	◆
Carmen Calcedo	A	7:00	●
Aleisha Cunha	A	7:00	●
Shanta Otwell	B	7:00	●
Jenee Hill	B	7:00	▲
Karisa Santillan	D	7:00	●
Ruby Peavier	B	7:00	●
Marlene Primmer	B	7:00	●
Leola Starke	A	7:00	●
Denita Eckart	A	7:00	▲
Alise Castleman	A	7:00	●
Louisa Epperson	D	7:00	●
Velia Trottier	A	7:00	●
Vesta Hipple	A	7:00	●
Meri Carmody	C	7:00	●
Diane Sutera	C	7:00	●
Melynda Jessen	A	7:00	▲
Ardelia Ruffo	A	7:00	●

● complete ▲ check item ◆ special

4 Checklist Observation Table

Item	Date						
	4/14/22	4/15/22	4/16/22	4/17/22	4/18/22	4/19/22	4/20/22
P r e - O p							
1. Charge nurse – discuss items?							
2. Pt./family engaged?							
3. Not from memory?							
4. Each family member speaks?							
P r a c e d							
1. Someone ensured readiness?							
2. Hard stop for briefing?							
3. Everyone speaks?							
4. Surg/proced asks for concerns B4?							
5. Not from memory?							
D e b r i e f							
1. Someone ensured readiness?							
2. Specimen label read aloud?	N/A			N/A		N/A	
3. Not from memory?							
4. All attentive?							
5. Surg/proced in room for debrief?							

Key: 1st Box Mid Box Last Box Not Applicable

□ ■ ■ □

5 Safety training chart Date revised:

Staff Name	Checklist Education	CUS Training	Checklist Observer Training
Mariou	○	○	○
Jenny	○	○	○
Hye	●	●	●
Sanora	○	○	○
Jacinda	●	●	●
Moshe	●	○	○
Rolanda	●	●	●
Cassie	●	●	○
Werner	○	○	○
Carletta	●	●	○

6

March

●	●	▲	●	●

Calendar to record days with daily huddles ●, checklist observations ▲ and any training or safety meetings ◆

7 Date Opportunity Action Results

TBD

Key

- Can you connect an organization value or strategy to your visual board?
- Patient table with color code on completeness of pre-procedure documents promoting safe care.
- Keep track of count of procedures since last harm incident each day and update the board. Add count of procedures since last "near miss" if you have the data.
- Summarize your checklist observations—the table lists the items included in your maintenance observation forms.
- Safety skills training grid makes it clear who on your team has had safety training and who is teed up.
- A calendar can show daily huddle performance if you are using daily huddles; also flag safety meetings, training, special events.
- A table to track opportunities to improve performance, actions and what resulted.

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