

**Team Rating Scale<sup>1</sup>**  
Observer Instructions for Rating of Team Performance

**Observer Scoring Instructions:**

Observe the team interaction at the pre- and post-encounter huddle and the patient encounter. Do not interrupt the team. Using the 4-point scale, assess the team’s performance (regardless of the individuals’ performance) in each of the 6 competencies; and then provide an overall/global score. Please score all team behaviors. Do not leave any item blank unless instructed to do so.

COMPENTENCIES	TEAM RATING			
	Well Below Expected	Below Expected	Above Expected	Well Above Expected
<b>Communication (of team with patient)</b> Assertive communication Respectful communication Effective communication	1	2	3	4
<b>Collaboration</b> Establishes collaborative relationships Integration of perspectives Ensures shared information	1	2	3	4
<b>Roles and Responsibilities</b> Describes roles and responsibilities Shares knowledge with others; Accepts accountability	1	2	3	4
<b>Collaborative Patient-Family Centered Approach</b> Seeks input from patient and family Shares with patient and family Advocates for patient and family	1	2	3	4
<b>Conflict Management / Resolution</b> Demonstrates active listening Respectful of different perspectives Works with others to effectively manage conflict	1	2	3	4
<b>Team Functioning</b> Evaluates team function and dynamics Contributes effectively Demonstrates shared leadership	1	2	3	4
<b>Global Rating – Score</b> Provide a single rating of the team’s performance	1	2	3	4

<sup>1</sup> Adapted from Modified McMaster-Ottawa Scale:

[https://fhs.mcmaster.ca/tosce/documents/tosce\\_checklist\\_user\\_instructions.pdf](https://fhs.mcmaster.ca/tosce/documents/tosce_checklist_user_instructions.pdf)

## Detailed explanation of behaviors for each scoring category:

### Communication

- **Well Above Expected:** The team provides comprehensive information about the purpose of the encounter and its findings throughout the encounter. The team anticipates the patient's questions by asking for questions, addresses concerns and answers questions directly. The team is explicit about conversations among the members and includes the patient in those discussions by summarizing.
- **Above Expected:** The team provides basic information about the purpose of the encounter. The team respectfully addresses the patient's questions when initiated by the patient. The team includes the patient in its discussions by turning to the patient but uses some jargon.
- **Below Expected:** The team provides inconsistent information about the purpose of the encounter. Team member interrupts the patient or other team members and asserts control over communication. The team does not demonstrate effective sharing of patient information.
- **Well Below Expected:** The team fails to inform the patient of its actions and intentions. The team talks down to the patient and/or avoids dialogue with the patient even when questioned. The team ignores the patient when members converse with one another.

### Collaboration

- **Well Above Expected:** The team recognizes disagreements and acts to reach consensus so that the patient perceives a unified approach.
- **Above Expected:** The team is able to reach agreement by discussing issues, with the patient's best interest in mind.
- **Below Expected:** The team is unable to reach agreement on at least half of the issues prior to or after the patient encounter.
- **Well Below Expected:** The team is unable to reach agreement on any issues related to the patient encounter. Team does not demonstrate a value each other's ideas about a better patient outcome.

### Roles and Responsibilities:

- **Well Above Expected:** Team members actively solicit information about one another's roles and scope of practice before the patient encounter.
- **Above Expected:** Team members check in when a misunderstanding about one another's roles is apparent.
- **Below Expected:** Team's discussion about scope of work leads to vague and unclear understanding about patient care and outcome.
- **Well Below Expected:** Team members act on mistaken assumptions about one another's roles.

### Collaborative Patient-Family Centered Approach:

- **Well Above Expected:** The team **consistently** elicits and explores family and community information, and actively seeks to involve both in the patient's care plan.
- **Above Expected:** The team elicits and explores **some** family and community information, and actively seeks to involve both in the patient's care plan.
- **Below Expected:** The team does not consistently inquire or use patient-specific circumstances, cultures, values for improved patient well-being.
- **Well Below Expected:** The team fails to elicit any information about the patient's family or home setting.

### Conflict Management Resolution:

- **Well Above Expected:** The team recognizes areas of potential conflict and elicits ways to resolve them and agrees on a process to anticipate future conflict.
- **Above Expected:** Team member listens to other team members, asks for feedback if not clear, recognizes conflict.
- **Below Expected:** Team does not demonstrate a value toward different interprofessional opinions and approaches.
- **Well Below Expected:** The team argues in front of the patient and has no mechanism for resolving the arguments.

### Team Functioning:

- **Well Above Expected:** The team is able to reflect on its own actions and purpose and change dynamics to achieve excellence in team function.
- **Above Expected:** The team demonstrates recognition of its function as a unit and discusses communication strategies.  
**Below Expected:** Team functioning appears disorganized, on focused on task and dialogue is tangentially related to patient outcome.
- **Well Below Expected:** The team has no recognition of the need to function as a unit; individuals make decisions according to their own opinion.

**Global Rating Score:** Provide an AVERAGE of the ratings on all the factors above.