

# Identifying Staff and Resident Issues and Concerns in Real-Time: Tiered Huddles

## Promising Practices to Enable a Healthy Workforce to Provide Person-Centred Care in Long-Term Care

If you are looking for promising practices used in long-term care to foster healthy work environments to deliver safer, higher quality person-centred care, then this resource is for you.





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## Identifying Staff and Resident Issues and Concerns in Real-Time: Tiered Huddles

Hebrew SeniorLife, located in Boston, Massachusetts, is rooted in Jewish heritage that honours its elders, while promoting the independence of all seniors and striving to transform every aspect of the aging experience for the better. It does this by providing vibrant senior communities; offering a full spectrum of personalized, holistic care; conducting influential research that continually advances the quality of life for seniors and informs public decision-making; and teaching to grow the ranks of geriatric care providers. The initiative is based on the tiered huddle framework which was originally developed at the Cleveland Clinic in 2018 as a continuous improvement project.<sup>1</sup> This promising practice was informed by an interview with the Chief Nursing Officer and Vice President of Patient Care Services Hebrew SeniorLife.

1. For more information on the Tiered Huddles approach, see here: <https://consultqd.clevelandclinic.org/tiered-huddles-improve-quality-across-the-system/>

# Objective and purpose of the initiative

## How the initiative improves person-centred care and enables a healthy workforce in long-term care (LTC)

This promising practice aims to establish and maintain a system where LTC staff challenges and issues can quickly be addressed locally or escalated as necessary to develop and communicate countermeasures.

- It creates a formal space for long-term care staff to immediately identify worrisome workplace trends and issues (e.g. physical or psychological abuse from a patient, non-functional equipment, etc.) and collectively determine whether a solution can be created at the unit level or if escalation and support from senior management (such as nursing directors, or the president and CEO) is required.
- It establishes a formal system where issues, accountability, action items and solutions are tracked and reported on across various tiers (such as different staffing levels).
- It creates regular opportunities for staff to share personal challenges and issues that otherwise may go unreported (e.g. being cursed at by a resident).
- It stimulates collective action and encourages staff to recognize their capacity to solve challenges and issues before they worsen.
  - Short-term success is reflected when identified issues are addressed and solved at any of the five-tiered huddle levels.
  - Long-term success is realized when measures of employee safety and wellness improve (e.g. a reduction in the percentage of staff reporting physiological abuse from families).

“We try to solve as many problems as possible at the frontline level and oftentimes this just requires creating a space to do so [...] people can become complacent working in a stressful environment and will avoid addressing problems because they know they can’t solve it alone.”

– Interview Participant

## Approach

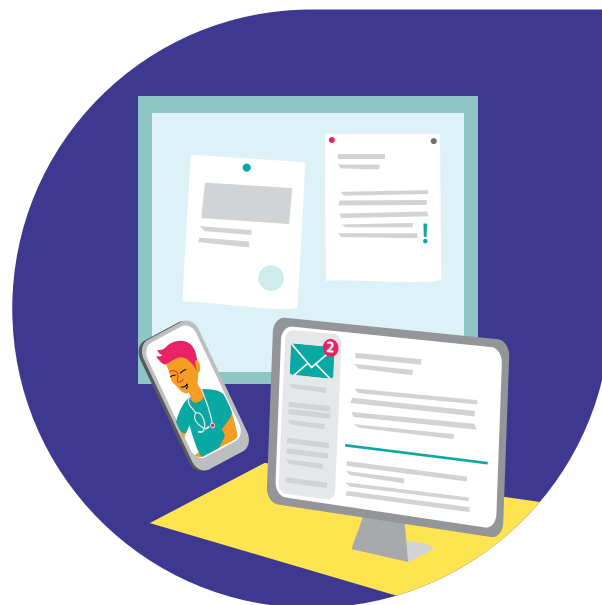
### Main features of the initiative

- The primary impetus for implementing tiered huddles at Hebrew SeniorLife was to address rising concerns about staff morale and performance resulting from workplace safety and violence concerns. A May 2019 survey on workplace violence revealed that, given the nature of older adults with dementia, psychological abuse from resident family members was becoming more routine and accepted.
- Tiered huddles are a series of brief, focused conversations that take occur daily across different units and floors in the LTC home, opening the lines of communication from tier one (nursing and personal care staff) and through executive management (managers and directors).
- At the floor level, tiered huddles are usually led by senior personal care assistants (PCAs); simple prompt questions are used to structure conversation and identify any pressing issues related to personal or resident well-being. Huddles collectively determine which issues can be resolved at the level one tier or need to be escalated to senior levels, thereby identifying concerns needing enterprise-level attention.

- Each unit records issues using sticky-notes placed on a whiteboard indicating which tier is responsible for addressing the issue. More detailed reporting and tracking occurs in shared Microsoft Excel spreadsheets where various issues are assigned ownership and progress updates, and recommended action items are listed.

## Who was involved?

- The concept of tiered huddles was originally developed within a large hospital network setting. Recognizing the challenges of implementing a prescriptive and systematic health system framework within an LTC setting, senior management decided to streamline and modify the approach to align with the unique needs of staff and residents.
- The idea of implementing a tiered huddles system was identified by Hebrew SeniorLife’s chief nursing officer.
- Many different staff members, from all levels of the organization, actively take part in utilizing the tiered huddles framework. Senior PCAs tend to lead tier one huddles and work alongside staff to identify the root causes of pressing issues and decide whether the problem requires the expertise and resources from the upper tiers. As a result, senior management become responsible for developing action items and allocating resources for resolving identified issues.
- Tier one huddle leaders are especially critical to the system’s effective operation as many issues are identified at that level; thus, senior PCAs must be committed to meaningfully engaging staff and probing where necessary to uncover important challenges and concerns.



## Implementation

### Timeline

Hebrew SeniorLife first introduced its tiered huddle initiative within specific floors and units in 2019. The framework has since been adopted by several other units within Hebrew SeniorLife’s LTC homes.

### Required skills, expertise and resources

- The tiered huddles framework requires extensive buy-in – usually in the form of time and administrative commitments – from all staffing levels:
  - Tier one staff must commit to daily touchpoints to not only discuss and identify challenges, but also collectively work together to develop adequate responses to issues that they can solve.
  - Upper tiers must also commit to weekly meetings where additional financial resources and cross-departmental collaboration is required to address a reported issue.
  - Tiered huddles also require all staff levels to carry out administrative duties,

including updating whiteboard and excel trackers and drafting progress and action reports. Sophisticated technology or software is not utilized to operate the tiered huddles system; instead, the organization has found success by keeping reporting and tracking simple through using whiteboards, sticky notes and shared Excel spreadsheets to track progress and provide updates and action items bi-directionally.

### Key factors and risks that hinder the implementation of the initiative

- Staff who don't meaningfully engage in tiered huddles don't recognize the value of participating.
- Huddle leaders who do not lead structured huddles and probe employees to uncover sensitive or systemic issues.
- Units and floors that have a weak collaborative culture often choose to elevate all identified issues without first recognizing the group's ability to potentially solve the challenge.

### Key enablers to implementing the initiative

- Early adopters (e.g. those who embrace change opportunities, are aware of the need to change and are very comfortable adopting new ideas) have been critical to the success of the tiered huddles system.
- Intrigued staff who have volunteered to pilot and lead the initiative on their floor after recognizing the benefits that tiered huddles created for their colleagues have also been important for growing the program.

## Impact of the initiative

### Indicators of success

- In some cases, tiered huddles have helped to build unit capacity and agency.
- Issues are being identified and solutions are being developed across all levels of the organization.
- Tiered huddles have expanded organically to other departments.

"The secret sauce of tiered huddles is that floors slowly begin to recognize that they have the ability to make important decisions about the challenges they face [...] this is the key desired outcome of tiered huddles."

—Interview Participant

## How success was measured

- To date, success has been measured by analyzing the number of issues that have been addressed through the tiered huddles system (e.g. counting the number of whiteboard sticky notes that have been moved to the 'completed' column).
- Hebrew SeniorLife intends to measure long-term success by administering another employee survey on workplace violence to determine whether the percentage of staff who, given the nature of older adults with dementia, experience regular physical and psychological abuse has decreased since the May 2019 survey.

# Sustainability and scalability

## Sustainability

- Hebrew SeniorLife intends to continue expanding the use of tiered huddles across its LTC homes. However, it was noted that successful implementation is seriously inhibited by floor teams and units that lack cohesiveness and comradery.

## Scalability

- Hebrew SeniorLife successfully tailored the [Cleveland Clinic framework](#) to match its needs and competencies of its organization.