**Appendix A**

**Non-participant observations**

These procedures will need tailoring to the context of individual wards.

***Preparation***

* One researcher or observer meets the team to establish a relationship with a key person on the ward who can induct the observers into the environment, practices, and provide information on ward staff.
* Introduce other staff to observers before any observations and recordings take place (this can be done by making all staff aware of the information booklet).
* Find out where and when huddle meetings take place.
* At least a week before the observation, contact the key contact on the ward, email them information about the observations, agree when the observations will take place.
* Explain that you want to observe the way in which they typically conduct these meetings (so check if there are any exceptional situations expected that day).
* Ask for a list of who will be on shift that day, with photos and job titles, along with information on the meaning of different types/colours of uniforms. If this was not obtained prior to site visits then it will need to be asked for on the day, along with who will be involved in the day’s huddles (be aware that those on shift may have changed due to sickness/annual leave).
* Speak to the key contact prior to huddle observation visit via a phone call about levels of involvement with huddles among staff members, and staff members’ working schedules during the huddle observation visit, to help determine which staff members could be interviewed.
* Find out from key contact how huddles are led (e.g. rotating role among certain staff members etc.).
* If this is a research project, an opt-out option for staff should be offered. If used as part of implementation then opt out would be part of the diagnostic of acceptance of the huddle.
* Emphasise that the ward should keep a record of who has opted out to arrange an alternative way to pass on information from the missed huddle.
* All this preparation is so that you interfere as little as possible with the process of the meeting as it would ordinarily be carried out.

***On the day***

* Arrive early to the ward.
* Dress in keeping with the ward norms and be bare below the elbows.
* Locate a staff room for keeping coats/bags and resting in between observations.
* Tools required include recording equipment (x2), 8 copies of huddle observation notes sheet, huddle rating tool, information pack, refreshments for observers. Staff interview consent forms and information sheets. 2 clipboards and pens. A pack of spare batteries if recording.
* If you are conducting interviews on the day, make sure that their arrangement will not interfere with huddles.
* At least 15 minutes before the start of the huddle go to the huddle location to set up where observers will stand to maximise recording. Be aware that this is not always possible as the huddles can take place at busy reception areas and we may interfere/obstruct walking space if we are there too early.
* Stand on opposite sides of the space so that both observers between them can see and hear all involved.
* Find out where the person leading the huddle stands, and make sure that one recorder is located in this area, even if people are quite spread out.
* Try to place recorders away from beeping machines and phones particularly at sites where the huddles occur by the nurses’ station.
* If anyone asks us who you are, give them an information sheet but otherwise don’t introduce yourself or interfere with the structure of the meeting in any way.

***Methods of data collection***

* Data collection: audio-record the huddle to be later transcribed verbatim using the key elements (in yellow highlight) of the Jeffersonian transcript notation annotation saved in transcription guide folder.
* Sketch visual layout of the huddle (e.g. position of board and staff members) and any changes throughout.
* Ethnographic notes on who the participants are (e.g. facilitator, seniority, job title), location, duration, atmosphere, what/who is in the background, significant gestures, any other impressions on social/emotional features (use the observational tool sheet to record this).
* Record names/roles.
* Record order of speakers to aid with transcription – this can be done in this style – nurse 1 (N1); trainee doctor 1 (T1); consultant 1 (C1); senior nurse (SN1); facilitator (F); doctor (D1).
* Take comprehensive notes throughout the huddle to help rate each of the four dimensions.

***After the huddle***

* If possible, confirm who the individuals present at the huddle were with the key contact.
* Confirm the time of the next huddle meeting and return and capture all meetings over the course of a day.
* If they are huddling at weekends or at night, you might need to return on a different day to capture this.
* Make a note of the recording title on the observation tool to ensure they are matched correctly when transferring to a computer.
* Rate the huddle dimensions using the observation tool (fill it out immediately after).
* If this is a research project do not provide feedback. If it is an improvement project provide feedback in real time.

***Challenges***

* Ensure rest periods between the huddle to address potential observer fatigue.
* Recording a large group of people accurately needs good audio equipment and possibly more than one microphone. It will be important to note which recorder is being used for which recording in the huddle observation notes sheet so that poorly performing recorders can be identified.
* Transcribing several interlocutors accurately is mitigated through taking notes on who is speaking.
* The huddles tend to be short (2–7 minutes) and it can be difficult to keep track of the order of people speaking. Having both observers try to capture this might help with accuracy and coverage.
* Observers should take note of noisy machines and where phones are to allow for determination of optimal place to stand.
* To minimise observer presence on the ward affecting staff in the huddle a key contact on the ward can explain to staff that there will be observers on the ward that day (or the next day) and the purpose is not to judge their performance but to look at the everyday use of huddles (i.e. focus is on the process not the individuals). The observers can then begin work knowing their presence has been explained and this will minimise drawing attention to it at the time of the observations.

**Participant observations**

1. Train a few staff members to undertake the observation on a rotational basis.
2. Appoint one of the trained members of staff to observe the huddle before the start.
3. When implementing, the huddle observations of each huddle are recommended to allow rapid learning.
4. Once huddles are well established the observations can be reduced to weekly and eventually on a random basis every 2–4 weeks.
5. The observation taken with the tool will allow the staff to consider how to improve the huddle and to assess where changes are required.
6. This is a non-judgemental tool and as one uses the tool the staff will see the places to improve.
7. Feedback needs to be undertaken in real time so that the next huddle can be improved.
8. When monitoring over longer term, one is looking to see if there has been a fall in any of the dimensions.