

A Checklist for Creating Checklists

Content-Related Checks

- ___ Involve the Professionals Who Do the Work (e.g., Surgeons, Nurses) in Creating the Checklist.
- ___ Keep the Checklist Short.
 - Five to nine items is the rule of thumb, but the number of items will vary depending on the situation
 - Paper checklists should fit on one page
- ___ Incorporate “Killer Items”—or the Steps that Are Most Dangerous to Skip and Are Sometimes Overlooked.
- ___ Use Simple, Exact Wording and Language That Is Familiar to Team Members.
- ___ Include Communication Checks at Important Junctures (e.g., At the Start of Surgery), Which Prompt Team Members to Share Their Expertise in Identifying, Preventing, or Solving Problems.
- ___ Ensure the Checklist Is Easy to Read (e.g., Use Sans Serif Type, Use Both Upper- and Lower-Case Text, Avoid Distracting Colors, Graphics, or Colors).

Procedure-Related Checks

- ___ Determine Whether You Want to Implement a “Do-Confirm” Checklist (i.e., First Complete the Tasks, Then Pause to Run the Checklist), or a “Read-Do” Checklist (i.e., Read the Checklist Item by Item While Completing the Tasks).
- ___ Authorize a Specific Team Member to Kick Off the Checklist and Ensure the Team Completes It (e.g., the Circulating Nurse Kicks Off the WHO Safe Surgery Checklist).
- ___ Set Up a Clear Procedure for When to Use the Checklist (e.g., When the Patient Is Wheeled Into Preop).
- ___ If the Checklist Is Longer Than a Few Items and/or Relates to a Multi-Step Process (e.g., a Surgery), Identify Clear Pause Points, or Times When the Team Must Pause to Complete Specific Sections of the Checklist.
- ___ Test the Checklist in a Real-World Environment. Revise, as Needed, and Keep Testing Until the Checklist Works for Team Members.

Source: The checklist summarizes research from the following book: Gawande, A., *The Checklist Manifesto: How to Get Things Right*, New York, New York: Metropolitan Books, 2009. Healthcare leaders are encouraged to read Gawande's entire book to get a complete understanding of the nuances involved in developing an effective checklist. Many of these recommendations come from Boeing's Daniel Boorman, whom Gawande quotes extensively.