Quality Improvement: Team Concepts

Topics

• Team basics and team effectiveness
• Create your quality improvement (QI) project charter
• Build your QI team
Team Basics and Team Effectiveness

QI Is a Team Process

A team approach is needed when:
• The process or system is complex
• No one person in an organization knows all the dimensions of an issue
• The process involves more than one discipline or work area
• Solutions require creativity
• Staff commitment and buy-in are needed

High-performing Teams

Teams that perform well:
• Have a clear and shared vision (a shared “mental model”)
• Have clear roles and responsibilities
• Have strong team leadership
• Engage in the discipline of regular feedback
• Develop a strong sense of collective trust and confidence
• Create mechanisms to cooperate and coordinate
• Manage and optimize performance outcomes

Barriers to Team Performance

• Inconsistency in team membership
• Lack of role clarity
• Lack of information sharing
• Conventional thinking
• Misinterpretation of cues
• Varying communication styles
• Lack of coordination and follow-up
• Hierarchy
• Defensiveness
• Conflict
• Distractions
• Fatigue
• Workload
• Lack of time
Effective Team Leaders

• Organize the team
• Articulate goals clearly
• Empower members to speak up and share their ideas, knowledge and perspectives
• Enable decisions through collective input of members
• Actively promote and facilitate good teamwork
• Skillfully work with the team to employ conflict resolution

Effective Team Members

• Provide useful ideas, information and feedback
• Engage in team decision-making
• Understand their QI team roles and responsibilities
• Assist and enable their fellow team members
• Contribute to conflict resolution
• Reduce stress on the team as a whole by putting the needs of the team first
Your QI Project Charter

When Is QI a Team Project?

- Changes will be made that affect multiple roles that work together, not just an individual
- A multidisciplinary team is needed
- A process is involved
- The problem is recurring - past efforts to improve haven’t worked
- Multiple cycles of improvement may be needed
- Information needs to be gathered systematically to clarify issues
- The issue is not a "quick fix" - rather a deeper system or process problem
QI Charter: Organizing Around the QI Goal/Aim

The QI charter is ultimately based on the goal or aim you are seeking

- Problem statement
  - Dates
  - Specifics
  - Quantify the problem
  - Difference between current/desired performance
  - Problem impact
- Background
- Goals
- Scope
- Timeline
- Team roles & responsibilities
- Resources required
- Barriers
- Approvals
- Stakeholders

QI Project Charter Form

QI Basics

QI Project Charter

1. Need of project
2. Project mission
3. Project manager
4. Project team
5. Project plan
6. Quality goals
7. Quality indicators
8. Quality metrics
9. Improvement cycle
10. Key milestones
11. Risk management
12. Change control
13. Communication plan
14. Project scope
15. Project budget
16. Project timeline
17. Project resources
18. Project stakeholders

QI Project Charter Form is protected as per the ethical guidelines for use of this template.
QI Work Plan

Building Your QI Team
Common Team Roles

- Project sponsor
- Team leader
- Meeting facilitator
- Team contributor
- Data specialist
- Systems specialist
- Scribe/Note taker

- Not all roles are always present or necessary
- Some roles are fulfilled by the same person
- Consider rotating roles and responsibilities

Sponsor

- Determines scope and authority of QI team
- Assists in defining purpose
- Secures necessary resources for the team
- Reviews and provides feedback regarding project outcomes
- Helps disseminate information about the project’s purpose and outcomes throughout the organization
Team Leader

• Secures organizational support and necessary resources with the sponsor
• Identifies and recruits team members
• Drives and manages the project; follows charter, work plan, and timeline
• Ensures tests of change are implemented
• Oversees data collection
• Schedules meetings and develops agenda
• Responsible for the communication plan

Meeting Facilitator

• Works with team leader to prepare agenda and ensure presence of meeting resources
• Guides discussion through three phases of opening, narrowing, and closing
• Keeps group conscious of purpose, progress, and time
• Periodically synthesizes and summarizes themes to test understanding
• Assists in identifying and resolving conflict
• Assists in developing action steps
Team Contributor

- Participates fully to support and achieve the goals of the project charter
- Helps gather and interpret needed information
- Acts as liaison with others in the organization as needed
- Provides subject matter expertise about processes they carry out
- Advances their learning and skills about QI as they engage in the project

Data Specialist

- Collects and aggregates data
- Helps with reporting and data visualization needs
- Conversant and knowledgeable about the content and topics presented in the “Using Data” module
- Team members can grow into this role during the QI project
**Systems Specialist**

- Could be an information technology (IT) or information systems (IS) resource
- Could be staff or functional role who has had extra training in the electronic health record (EHR), often a “super-user”
- Supports team in leveraging electronic systems to achieve the project goal
- Provides perspective based on deeper understanding of the EHR or other electronic systems

**Scribe/Note Taker**

- Prepares and distributes minutes covering major discussions points, conclusions and decisions, and action items
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