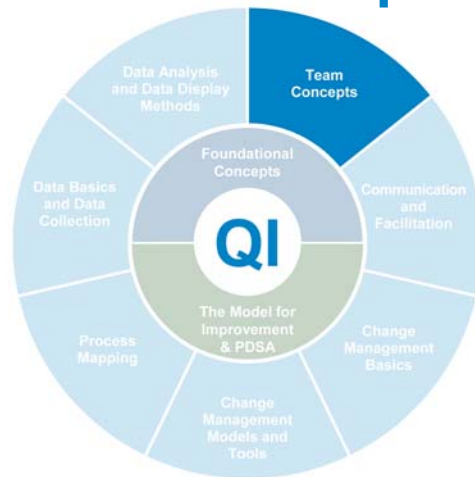


Quality Improvement: Team Concepts



Topics



- Team basics and team effectiveness
- Create your quality improvement (QI) project charter
- Build your QI team



Team Basics and Team Effectiveness



2

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



Source: <https://www.hrsa.gov/sites/default/files/quality/toolbox/508pdfs/qualityimprovement.pdf>

3

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



4

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



5

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



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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



7

Your QI Project Charter



8

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



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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

The QI Project Charter organizes the framework of your quality improvement (QI) project and provides as necessary for your project team, sponsors, and customers.

Adapted from:

Introduction
A project charter states the goals, scope, timing, requirements, and team roles and responsibilities for a QI project. The charter may be developed by leadership at an organization and then handed off to the QI team leader. It also may be developed by the QI team leader and then approved by leadership. The charter sets forth the scope of the work and what is to be accomplished as part of a QI project.

How to Use
This tool should be completed either by leadership at an organization or by the project leader with input and review by the project team. If a tool developed by leadership, it should have their approval before moving forward.

- Step through each of the fields in the template below and follow the recommended descriptions of what to include in each field.
- After completing the individual fields, review your QI Project Charter as a complete document and confirm that your QI team will be working on and what they'll achieve is clearly described. Agree mutually with your project should be able to read the document and gain an understanding of the project and its scope.

An example QI Project Charter is provided at the end of this document for your reference.

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QI Project Charter

1. **Name of project:**
Enter name of project here.
2. **Problem statement**
(What is the nature of the work and what are you attempting to accomplish?)
Elements of your problem statement may include:
 - Specific dates in which the problem occurred (month/year)
 - Specifics of the problem
 - Quantify the problem
 - Differences between current and desired/respected performance
 - Impact of the problem on patients, organization, staff, etc.
3. **Background**
Describe the history and context of your project.
4. **Goals**
(What improvements are you seeking to achieve?)
5. **Timeline**
(What are the start and completion dates for your project and any major milestone dates?)
6. **Team roles and responsibilities**
Enumerate the team members and specific roles. This can be done directly in the charter or utilizing the Team Roles and Responsibilities Template as an addendum to the Charter. Some typical roles are listed below:
 - Project sponsor
 - Team leader
 - Meeting facilitator
 - Group contributor
 - Data specialist
 - Systems specialist
 - Scribe/Note taker
7. **Resources required**
Identify specific resources, including staff time, meeting rooms, equipment, etc.
8. **Barriers**
Include known barriers at the outset of your project.
9. **Approvals**
List any approvals that you know of, such as managerial approval for staff time devoted to your project.

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QI Basics: QI Project Charter



Common Team Roles



Project sponsor



Data specialist



Team leader



Systems specialist



Meeting facilitator



Scribe/Note taker



Team contributor

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



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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



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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



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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



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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



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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



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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



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Scribe/Note Taker



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



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QI Team Roles and Responsibilities Tool



QI Basics
QI Team Roles and Responsibilities

The QI Team Roles and Responsibilities tool is a basic checklist you can use to confirm that key roles and responsibilities are being covered by members of your quality improvement (QI) team.


Adapted from:

Introduction
 This checklist aids in ensuring all basic team roles and responsibilities are understood, assigned and recorded. We recommend either embedding the table in the Project Charter or storing the tool together so that anyone can quickly learn the basic details of the project, including staffing bids for current and future releases.

How to Use
 This tool should be completed by the project leader with input and review by the project team. Add additional rows as necessary.

- Role:** Enter the name of the role. Some standard roles have been provided.
- Responsibilities:** Describe the responsibilities of the role. Some example responsibilities for the standard roles listed have been provided.
- Name(s):** Include names of individual team members here. Remember that people can serve multiple roles (e.g. Team Leader, Team Contributor, and Facilitator) and more than one person can serve as a role (e.g. Team Contributor, Meeting Facilitator, etc.).
- Name/Comments:** Any auxiliary notes, descriptions, comments, etc. can be entered here.

An example...


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QI Team Roles and Responsibilities Checklist

Role	Responsibilities	Name(s)	Notes / Comments
Project Sponsor	<ul style="list-style-type: none"> Determine scope and authority of QI team Assists in defining purpose Secures necessary resources for the team Reviews and provides feedback regarding project activities High level overall information about the project's purpose and outcomes throughout the organization 		
Team Leader	<ul style="list-style-type: none"> Secures organizational support and necessary resources with the sponsor Identifies and recruits team members Drives and manages the project, follows charter, develops a work plan and timeline Ensures team of charge are implemented and maintains the effort Responsible for the communication plan (See QI Communication Plan Template) 		
Meeting Facilitator	<ul style="list-style-type: none"> Works with team leader to prepare agenda and ensure availability of meeting resources Drives team to establish and articulate framework within which to work Conduct team discussion Keeps group conscious of purpose, progress, and time Facilitates consensus and summarizes themes to aid understanding Assists in identifying and reaching conflict Assists in developing action steps for the closing phase of the meeting 		
Team Contributor and/or Subject Matter Expert	<ul style="list-style-type: none"> Participates fully to support and advance purpose, goals, and processes Brings unique and relevant needed information Acts as liaison with others in the organization as needed Provides input about known processes Advances learning and skills about QI through project participation 		

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Stratis Health is a nonprofit organization that leads collaboration and innovation in health care quality and safety, and serves as a trusted expert in facilitating improvement for people and communities.

This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) as part of an award totaling \$625,000 with 0% financed with non-governmental sources. The contents are those of the author(s) and do not necessarily represent the official view of, nor an endorsement, by HRSA, HHS or the U.S. Government. (December 2018)

