QI Basics

**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.

## 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 two together so that anyone can quickly learn the basic details of the project, including staffing both for current and future reference.

## How to Use

The project leader should complete this tool with input and review by the project team. Add additional rows as necessary.

* **Role:** Enter the name of the team 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 Scribe) and more than one person can serve in a role (e.g., Team Contributor, Meeting Facilitator, etc.).
* **Notes/Comments:** Any ancillary notes, descriptions, comments, etc. can be entered here.

An [example](#example) QI Team Roles and Responsibilities checklist is provided at the end of this document for your reference.

**QI Team Roles and Responsibilities Checklist**

| **Role** | **Responsibilities** | **Name(s)** | **Notes / Comments** |
| --- | --- | --- | --- |
| Project Sponsor | * Determine 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, develops a work plan and timeline * Ensures tests of change are implemented and oversees data collection * Schedules meetings and develops agenda * Responsible for the communication plan (See [QI Basics](http://www.stratishealth.org/expertise/quality/QIBasics.html) Communication Plan Template) |  |  |
| Meeting Facilitator | * Works with team leader to prepare agenda and ensure availability of meeting resources * Guides team to establish and articulate framework within which it will work * Guides team discussion * 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 (or the closing phase of the meeting) |  |  |
| Team Contributor and/or Subject Matter Expert | * Participates fully to support and advance purpose, goals, and processes * Helps gather and interpret 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 engagement |  |  |
| 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 |  |  |
| Systems Specialist (EHR/IT) | * Could be an IT or IS resource, or staff or functional role with extra training in a certain application (e.g., electronic health record super user) * Supports team in leveraging electronic systems to achieve project goal * Provides perspective based on deeper understanding of the electronic health record and/or other applications |  |  |
| Scribe / Note Taker | * Captures conversation summaries, decisions made, action items, notes, etc. * Creates meeting summary documents |  |  |
| Others  (include new row for each) | * Describe responsibilities here |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Example QI Team Roles and Responsibilities Checklist

| **Role** | **Responsibilities** | **Name(s)** | **Notes / Comments** |
| --- | --- | --- | --- |
| Project Sponsor | * Determine 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 | * Dr. Jane Polinski | * Member of clinic leadership |
| Team Leader | * 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 tests of change are implemented and oversees data collection * Schedules meetings and develops agenda * Responsible for the communication plan (See [QI Basics](http://www.stratishealth.org/expertise/quality/QIBasics.html) Communication Plan Template) | * Juan Melendez |  |
| Meeting Facilitator | * Works with team leader to prepare agenda and ensure availability of meeting resources * Guides team to establish and articulate framework within which it will work * Guides team discussion * 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 (or the closing phase of the meeting) | * Juan Melendez (but this role may be delegated as needed) |  |

| **Role** | **Responsibilities** | **Name(s)** | **Notes / Comments** |
| --- | --- | --- | --- |
| Team Contributor and/or Subject Matter Expert | * Participates fully to support and advance purpose, goals, and processes * Helps gather and interpret 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 engagement | * Dr. Jane Polinski (as needed for clinical expertise) * Gale Velasquez * Kenji Omada * Juan Melendez * Brenda Wilson |  |
| 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 | * Brenda Wilson |  |
| Systems Specialist (EHR/IT) | * Could be an IT or IS resource, or staff or functional role with extra training in a certain application (e.g., electronic health record super user) * Supports team in leveraging electronic systems to achieve project goal * Provides perspective based on deeper understanding of the electronic health record and/or other applications | * Brenda Wilson |  |
| Scribe / Note Taker | * Captures conversation summaries, decisions made, action items, notes, etc. * Creates meeting summary documents | * Various | * Role will be rotated at each meeting |
| Others  (include new row for each) | * Describe responsibilities here |  |  |