Quality Improvement Basics: Building Your QI Team

Slide 1 Objectives
After completing this module, participants will be able to

- Identify when a QI Team is needed.
- Describe the various roles found in a QI team.
- Discuss the responsibilities of the roles within the team.

Slide 2 When is a team needed?
When thinking through a problem, you want to be certain that the improvement you are seeking can be better accomplished by creating a QI project team and not just a singular activity or "one-off" task. Not everything is a "project" and not everything requires a team.

This can be a bit of a grey area, but looking at the issue at hand through these criteria can help you decide whether you'll need to assemble a team:

- Will the changes made affect multiple roles that work together, as opposed to affecting a single individual?
- Does the change or improvement needed cut across multiple roles, units, departments, etc.?
- Is a process involved? (Again, does it span multiple departments…and we'll define what a process is in the Processes & Systems module)
- Is the problem recurring? —past efforts to improve haven't worked (maybe you have already tried the 'just fix it' approach?)
- Will Multiple cycles of improvement or iterative tests of change to test and refine the change be needed?
- Will Information need to be gathered systematically to clarify issues?
- Is the issue not a "quick fix "but rather it is a deeper system or process problem?

Teams are valuable because they combine individuals' unique knowledge and skills to bring about meaningful and sustainable improvements.

Quality Improvement is a journey and involves doing things differently to achieve real change. It involves a deep understanding of the problem, leadership, and staff commitment to changes that will make a difference, implementing tests of change and evaluating the impact on staff and the intended outcomes. People affected by the process and outcomes of the work must be involved. It is usually a combination of several of the factors here that indicates a need to recognize this work as a needed Quality Improvement project, create a QI project charter document (discussed in the QI Charters & Workplans Module) and assemble a team.

Slide 3 Common Team Roles
Let's talk about the concept of building a QI team and take a closer look at the roles that typically are needed on this type of team. Based on what you are trying to improve, you may not need to fill certain roles and multiple roles may be covered by a single team member.

Common roles include

- Project sponsor

- Team leader/Project manager
- Meeting facilitator
- Team contributor (subject matter experts)
- Data specialist
- Health Information Technology champion/specialist
- Scribe/Note taker

Compared to traditional hierarchical work with managers and those who report to them, the QI team, optimally will have a "flatter" structure where members "leave their stripes" (or hierarchical ranking) at the door and put the team members on equal footing. The idea is to fill needed responsibilities and have members contribute to solve the issue or opportunity at hand. An effective approach is to think of some of the listed roles more as responsibilities which can be shared or rotated, especially the role of the facilitator or the scribe/ note taker.

QI teams need diversity: people with different skills, experience, knowledge, and perspectives. Also, staff members who are directly involved with the issue or opportunity at hand should be represented on the team.

In the follow slides, we'll consider the responsibilities of each role.

Slide 4 Sponsor
The project sponsor is frequently an executive or other person in a leadership position that empowers the QI team to undertake its work.

The project sponsor will

- Determine scope and authority of the QI team.
- Assist in defining purpose of the team's work.
- Works with the team leader to develop a project charter to guide the team.
- Secure necessary resources for the team (such as allocating time in team member's work schedule).
- Ensures the right people are at the table.
- Helps to remove barriers the team might encounter.
- Review and provide feedback regarding project outcomes.
- Help disseminate information about the project's purpose and outcomes throughout the organization.

The sponsor may participate in team meetings at the outset and conclusion of the project and may attend meetings on an "as needed" basis depending on scope and duration. The team lead typically communicates with and confers with the sponsor throughout the project.

Slide 5 Team Leader/Project Manager
The team leader/project manager provides guidance and direction for the QI team and

- Secures organizational support and necessary resources with the project sponsor.
- Identifies and recruits team members.
- Works with the sponsor to develop a charter.
- Reviews and discusses the project charter with the team.
- Drives and manages the project, develops a work plan and timeline.

- Ensures tests of change are implemented and oversees data collection.
- Schedules meetings and develops agendas.
- Responsible for the communication plan (and ensure necessary communication outside the immediate team) We'll take a look at a sample communication plan in the Communication module.

Slide 6 Meeting Facilitator

The meeting facilitator can sometimes be rotated among members experienced in facilitation. This role

- Works with team leader to prepare the agenda and ensure availability of meeting resources including room/virtual bridge, equipment etc.
- Guides discussion including opening the meeting, reviewing meeting purpose and goals, keeping the discussion focused on the topic at hand…and then closing the conversation out with necessary actions and decisions needed.
- Keeps group conscious of purpose, progress, and time.
- Periodically synthesizes and summarizes themes to test understanding.
- Assists to identify and resolve conflict.
- Assists in developing action steps (or the closing phase of the meeting).

Slide 7 Team Contributor

Team members or 'team contributors' are often subject matter experts who have intimate knowledge of the processes involved in the issue at hand. The contributors are expected to

- Participate fully to support and achieve the goals of the project charter.
- Help gather and interpret needed information.
- Act as liaisons with others in the organization as needed.
- Provide subject matter expertise about processes they carry out.
- Advance their learning and skills about QI as they engage in the project.

This is a generalized list of tasks for this role, and it could also include other activities that rely on any member's particular expertise or job function. There isn't a specific number of team contributors you'll have on your team, but one or two that represent and understand the process(es) under discussion is typical. You will have more contributors if your scope is larger and covers broader multidisciplinary and/or cross-departmental processes.

Slide 8 Data Specialist

The data specialist role is a key role on your QI team. The data specialist

- Collects and aggregates data.
- Helps with reporting and data visualization needs (using charts, graphs, and tables).
- Is 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…particularly as you may not have a person that would be able to fulfill this role.

If you discover that someone on your team has special interest in learning these tasks, this is a good opportunity to develop staff members' skills in data collection and analysis.

Slide 9 Health Information Technology Champion /Specialist

The Health Information Technology Champion/Specialist Role is filled by one of your team members who

- Could be an IT or IS resource.
- Might also be staff or functional role who has had extra training in your electronic health record, often a "super-user."
- This person Supports the QI team in leveraging electronic systems to achieve the project goal.
- Provide perspective based on deeper understanding of the electronic health record and/or other electronic systems.

Overall, they are a person or several people on your team who have a deeper understanding of the EHR and how it supports the workflow. They might find themselves working closely with the data specialist or this may be a combined role where the systems specialist and data specialist are covered by single team member.

Slide 10 Scribe/Note Taker

Lastly, it's helpful to have someone fill the role of scribe or note taker at your meetings. As this role requires focusing on capturing conversation summaries, decisions made, action items, etc.….and for some it can make it harder for them to also to fully contribute their thoughts and ideas at the same time. This role may rotate among team members unless you have someone that enjoys the task or if you have an administrative support staff person attend and take on this work for your team.

The roles that have been presented here may be combined, assigned to a particular person, or divided differently, depending on how you structure your QI teamwork.

Slide 11 Summary

Remember to consider a QI team approach anytime changes to processes impact more than one person and extend across units or departments or when the problem is recurring (past attempts to fix the problem didn't solve it).

Common roles needed for QI teams include sponsor, team leader, project manager, meeting facilitator, subject matter experts, data specialist, HIT specialist, note taker. People may fulfil more than one role, but it is important to make sure all roles are covered.

Each QI team role has important responsibilities that help ensure project success. Being clear about roles helps to avoid duplication of work, role ambiguity, and tasks slipping through the cracks. It helps members recognize that the success of the team is a shared responsibility.

Thank you for taking time to learn about Building your QI team as part of the QI Basics course.