

Quality and Safety Series, Season 1, Episode 4: Team Forming

The speaker is Christine Bailey, Quality Improvement Organization Executive Director, HSAG.

Speaker 1 (00:03):

Today's topic is on team forming, which is a great place to start when you're getting ready to pull a team together to focus on a quality improvement effort. So, what is a team? It should be a small group of people with complimentary skills that are joining together for a common purpose, that are very committed to work together to resolve an issue or to create a project. So, there's some common roles that you need to have as when you're building your team. The first one is your executive sponsor. So, without leadership support, we're destined to fail. So, it's really important to identify your leader and that leader needs to have those key decision-making skills and power to be able to make decisions that will move the project along. The next is your process owner. And this is the person who holds direct responsibility and ownership of the process or initiative.

Speaker 1 (01:10):

And then your team leader is directly responsible for the project and is directing the team. So, it needs to be somebody with some great leadership skills that really motivates people. The next is a champion that has influencing ability among their peers. So, these folks are great for those tough peer-to-peer discussions. Administrative support is so important when you're leading a team, really identifying somebody that can help with those administrative things. And then frontline staff. This is key. Anytime you're changing a process or have an improvement effort, we really have to engage those that it directly affects. So, we have a template for a team roster, and this way you always have available the person's name, their position, and their contact information. So, meeting rules. And this is really important. So, it's so important to have those common roles to start and end on time.

Speaker 1 (02:20):

Use that agenda and make sure you stick to it so that you can really stay on that timeline and cover all the topics. No sidebar conversations, and it needs to be a safe zone. So, all ideas are considered and we need to really embed that just culture into these meetings so that everybody feels heard. It's a good idea to have a team charter, which is a living document to keep our team on track and consist of our objectives, our goals, our scopes, and responsibilities. So, we always know who is doing what. So, meeting schedule. It's so important to get those meetings on as early as possible and get them on folks' agenda and post the meeting schedule and provide a copy to each member. So, if it is going to be virtual, this is a great place to put that link so that people can access it very readily.

Speaker 1 (03:24):

So, you're meeting agenda. Again, it serves as a critical communication tool and it communicates what will be discussed. And if you do want some open discussion, build that into your agenda. Brainstorming sessions: build that into your agenda. Sometimes, we have so much going on, it's hard to remember from week to week or month to month what all was discussed in decisions that are made. So, again, that administrative support is important. Designate somebody to take minutes so you can track who attends the meeting. If somebody is habitually not, present, we want to make sure, maybe, maybe they're just too busy, so we need to move them



to an ad hoc member for our meeting notes. So, you know, you don't have to take word-for-word verbatim of what's discussed, just those main points. So, let's talk about the five stages of team development.

Speaker 1 (04:27):

It really is important to understand what phase your team is in. So, forming. Sometimes it's important to have a team building exercise or have that time built in as, as the team gets to know each other. You know, make those introductions. Don't assume everybody knows everybody. Highlight that person's skills. You know, why they're important to that team. Make sure you let them know what their particular skills and background are. Outline those project details. And, and again, in the beginning it's really important to make sure those details and those scope your, your goals, and objectives, that you start the meeting and, and really keep those in your focus. And then, establish your roles and responsibilities. So, then we go to storming. And this is when we usually hit the bumps in the road. And this is sometimes when you see the conflicts and people not coming to meetings, and it's really overcoming those communication barriers.

Speaker 1 (05:39):

Make sure your dominant group doesn't overshadow your passive group. You get into the norming, and this is where your work really begins. You've established that collaboration. There is no competition. We've learned how to communicate with each other. We can give our feedback openly. And, you know, we have really come together with a shared vision and shared goals and performing. This is when sometimes your leaders can pull back slightly and the team is almost on autopilot and have established they're holding each other accountable and continue to move forward, achieving those goals. Here's where we see the biggest bulk of moving that project ahead. And adjourning, a tough part of our five stages. When you get a group that is together and collaborative, especially when you've been real successful, sometimes it's hard. It's almost like you mourn that project and that group, especially when you've had a really good group to work with.

Speaker 1 (06:54):

But you know, everything comes to an end. So, we need to be able to achieve those goals. You know, that project is completed. Celebrate your success. Make sure that you celebrate what you've done and you acknowledge the hard work that that team has went through to achieve those goals. So, what are our takeaways? Choosing the right team. Make sure you have that executive sponsorship. Find a champion. Frontline staff—they have to be a part of the process. If you could have the best process or procedure that you develop around a table in a boardroom, but unless the frontline staff are a part of that, that understand what's going on in the floor, what's going on in their area, they're not going to be engaged and it's going to fail. Stay organized, communicate and reevaluate which stage of team development you are in, your team is in, and you'll know how to address the issues that arise.

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