Quality and Safety Series

Team Forming
OBJECTIVES

• Identify the key members of a team.

• Review resources to keep your team organized.

• Discuss the stages of team development.
What Is a Team?

- Small group of people
- Complementary skills
- Common purpose
- Commitment to work together
Forming a Team—Common Roles

- **Executive Sponsor**: Leader with decision-making power (not at every meeting)
- **Process Owner**: Holds direct responsibility and ownership of the process/initiative
- **Team Leader**: Initiates the project and is directly responsible for leading the team
- **Champion**: Physician/provider with authority and influencing ability among peers
- **Administrative Support**: Assists with materials, information, or services to carry out project
- **Frontline Staff Representatives**: Those directly involved with the day-to-day process
- **Topic experts**: Those who have the expertise, skills, knowledge, and experience in the area of focus
- **Ad Hoc Members**: Subject matter experts/specialists who join the team intermittently to provide information
# Team Roster Template

## Team Members

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Contact Information</th>
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**Alternates/Ad Hoc:**

Agree on Meeting Rules

• Common rules
  – Start and end on time
  – Use agenda
  – No sidebar conversations
  – No cell phones
  – All ideas considered

• Team charter
  – Living document
  – Keeps team on track
  – Consists of objectives, goals, scope, and responsibilities
Meeting Schedule

• Identify time and place (may be in-person or virtual)
• Does not have to be the same time and place each week/month
• Post the meeting schedule and provide a copy to each team member
## Meeting Schedule Template

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Place</th>
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Meeting Agenda

• Serves as a critical communication tool for the team
• Communicates what will be discussed
• Allows team members to prepare
• Keeps meeting on track
• Keeps meeting on schedule
• Promotes efficiency and effectiveness
# Meeting Agenda Template

**<Name of Meeting>**

**<Date>**

**<Time>**

## Objectives
- Objective 1
- Objective 2
- Objective 3

## Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Presenter Title</th>
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<td>Assignments, Wrap-up, and Q&amp;A</td>
<td>All</td>
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Meeting Notes

Information to capture:
• Meeting attendees
• Meeting date
• Team goal
• Discussion points
  – Next steps
  – Person responsible
  – Due date
# Meeting Notes Template

Team Members: 

Meeting Date: _________________  Team Goal: __________________________________________________________

<table>
<thead>
<tr>
<th>Main Points of Discussion</th>
<th>Next Steps</th>
<th>Person Responsible</th>
<th>Due Date</th>
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Five Stages of Team Development

1. Forming

• Make introductions
• Highlight skills and backgrounds
• Outline project details
• Define scope
• Establish roles and responsibilities

Five Stages of Team Development (cont.)

2. Storming

- Overcoming communication barriers
- Dominant vs. passive members
- Competitive ideas or team members
- Conflicting views

3. Norming

- Collaboration established
- No competition
- Effective communication
- Open feedback
- Shared vision
- Common goal
Five Stages of Team Development (cont.)

4. Performing

- Team cohesion
- Trust established
- Strong conflict resolution
- Less leadership oversight
- Internal accountability
- Movement toward achieving goals
- Adherence to timeline

Five Stages of Team Development (cont.)

5. Adjourning

- Goals achieved
- Project completed
- Celebrate successes
- Ensure sustainability
- Arrange hand off
- Provide debrief
Effective Team Leader

- **Clear goals**
  - SMART* goals
  - Timeline

- **Psychological safety**
  - Just culture
  - Conflict resolution

- **Roles and responsibilities**
  - Clear and accountable

- **Strong leadership**
  - Remove roadblocks
  - Establish team rules

- **Communication**
  - Frequent and transparent!

*SMART = specific, measurable, achievable, realistic, time-based

- **Team emotional intelligence**
  - Recognize team dynamics

- **Process and templates**
  - Standard work

“Teams who are motivated to complete a common goal often perform 5 times better than their counterparts.”

Bright Work. 7 habits of effective project teams. 2021. [https://www.brightwork.com/blog/7-habits-effective-project-teams](https://www.brightwork.com/blog/7-habits-effective-project-teams)
Key Take-Aways

• Chose the right team
  – Executive sponsor
  – Physician/provider champion
  – Frontline staff
• Stay organized
• Communicate
• Consider stages of team development
Thank you!

Questions: hospitalquality@hsag.com