

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			
Name	Position	Contact Information	
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

Meeting Schedule				
Date	Time	Place		



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



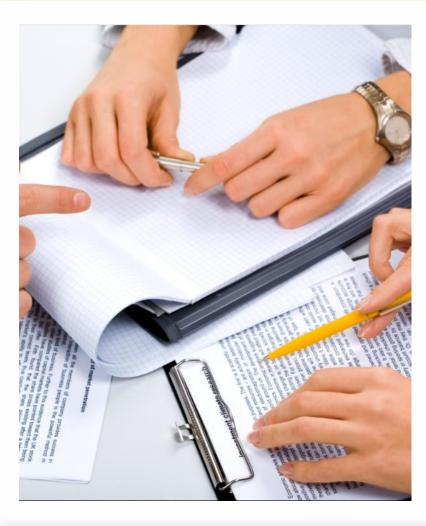


Meeting Agenda Template

	<name meeting="" of=""> <date> <time></time></date></name>				
		Objectives			
:	Objective 1 Objective 2 Objective 3				
		Agenda			
Time	Topic	Presenta Tit			
Time	Topic	Presenta Tit			
Time	Topic	Present Tit			
Time	Topic	Presenta Tit			
Time	Topic	Presenta Tit			
Time	Assignments, Wrap-up,	and Q&AA			



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:			

Main Points of Discussion	Next Steps	Person Responsible	Due Date



Five Stages of Team Development

1. Forming

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





Kumar S, Deshmukh V, Adhish VS. Building and leading teams. Community Medicine, 2014.39(4), 208-213. Retrieved from https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4215500/#:~:text=(20%2C21)%20Bruce%20Tuckman,Storming%2C%20Norming%2C%20and %20Performing.&text=In%20norming%20members%20get%20to,attitude%20to%20achieve%20the%20goals.

2. Storming

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





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3. Norming

- Collaboration established
- No competition
- Effective communication
- Open feedback
- Shared vision
- Common goal





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4. Performing

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





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

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– 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."



Key Take-Aways

- Chose the right team
 - Executive sponsor
 - Physician/provider
 champion
 - Frontline staff
- Stay organized
- Communicate
- Consider stages of team development







Thank you!

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