

# 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



# 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 of Meeting>**  
**<Date>**  
**<Time>**

**Objectives**

- Objective 1
- Objective 2
- Objective 3

**Agenda**

Time	Topic .....	Presenter <i>Title</i>
Time	Topic .....	Presenter <i>Title</i>
Time	Topic .....	Presenter <i>Title</i>
Time	Topic .....	Presenter <i>Title</i>
Time	Topic .....	Presenter <i>Title</i>
Time	Assignments, Wrap-up, and Q&A .....	All

# 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



# Five Stages of Team Development (cont.)

## 2. Storming

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



# Five Stages of Team Development (cont.)

## 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.”*

# 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](mailto:hospitalquality@hsag.com)