



NATIONAL QUALITY CENTER

Using Teams to Improve Quality

The Quality Academy Tutorial 11



STATE OF NEW YORK
DEPARTMENT OF HEALTH

National Quality Center (NQC)

The National Quality Center is pleased to bring you the Quality Academy, an online learning opportunity on key quality management concepts. The NQC provides no-cost, state-of the-art technical assistance for all Ryan White Program grantees to improve the quality of HIV care nationwide. The Center is funded through a cooperative agreement with the HRSA HIV/AIDS Bureau and managed by the New York State Department of Health AIDS Institute.

This Tutorial is titled:

Using Teams to Improve Quality

Learning Objectives: You Will Learn About...

- Why use teams?
- Interdisciplinary work
- Team roles and responsibilities
- Tips for teams

SKIP THIS SLIDE

Hello and welcome to Tutorial number 11 by the National Quality Center. No matter what the activity is, whether it is a research team, a football team, or a campaign team, we can accomplish a lot more working together than we can as individuals. This holds true in committing to and executing a quality improvement project. We are going to focus on how to apply the concept of teamwork to the implementation of a successful quality management program. Everyone in your organization performs a unique function, so we want to teach you how to integrate these disciplines so that everyone is working towards a common goal. This means that you will need to learn how to help your teams work together if you want to succeed. This isn't always easy, so we will outline several tips for successful teamwork to help you avoid common pitfalls. We will close today's session with some important references which will reinforce these ideas and further help you and your team with your plan. Thank you for taking this time with us today and please enjoy the training.

How's Your HIV Program?

COLUMN A

- Simple
- Everything's clear as a bell
- Tons of money
- No time pressure
- Everyone always has the same point of view

Select

COLUMN B

- Complex
- In need of creative answers
- We worry if we'll make payroll
- You want it ASAP
- Like herding cats

Select

4 Why Teams?

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Before we begin, let's start by thinking about how your organization functions and the interactions among the various stakeholders.

Which organization does yours match: Column A or Column B? In your opinion, which of these descriptions best represents your organization? Is it A – our HIV program is simple, everything's clear as a bell, we have tons of money, there is no time pressure, and everyone always has the same point of view? Or is the HIV program complex, in need of creative answers, you worry you'll make payroll, you want "it" -- like information or action - - as soon as possible, and it's like herding cats?

How's Your HIV Program?

COLUMN B

- Complex
- In need of creative answers
- We worry if we'll make payroll
- You want it ASAP
- Like herding cats

Select

- If you chose Column A, can you let us know where you work
- If you chose Column B, welcome to the club

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If you chose Column A, congratulations. And by the way, where did you say you worked?

We find that column B is a much more common description of our work environment.

Teams Outperform Individuals When

- The task is complex
- Creativity is needed
- The path forward is unclear
- More efficient use of resources is required
- Fast learning is necessary
- High commitment is desirable
- The implementation of a plan requires the commitment of others
- The task or process is cross-functional

Peter Scholtes et al., The Team Handbook

More and more organizations as complex as your own are using teams to tackle important issues.

Research has found that teams outperform individuals in many situations. For example, in situations that are complex or unclear where creative thinking is required, you can greatly benefit from using a team. Also, if the focus is on efficiency, or speed, then you may want to consider tackling the problem with a team as well. Most importantly, teams are invaluable when many people need to commit to the change, or the situation crosses departmental boundaries.

Key Question

How can we enable teams in our HIV programs to work most effectively?



The key question for this Tutorial is, how can we enable teams in our HIV programs to work most effectively?

Teams are especially important, when you are working to improve the quality of key processes. In this Tutorial, we'll explore using teams for quality improvement projects.

What Do Teams Need to Succeed?

- Clearly defined goals
- Well defined parameters
- Easily communicate within the organization
- Necessary knowledge and skills
- Accomplish tasks - how?

Scholtes et al., The Team Handbook

Teams not only need to be integrated into improvement projects, but also, they need to be integrated into the organization's overall goals and vision.

So, what do teams need?

Teams must have clearly defined purposes and goals that serve the organization.


Teams need clearly defined parameters within which to work.

Teams need to be able to get information and share findings with their colleagues.

Teams need to have people with the necessary knowledge and skills to accomplish their tasks.

Teams need to know how they are going to accomplish their tasks.

What is This Team Missing?



“It was so frustrating. We had all these meetings, but we couldn’t ever agree on what to do. Some people were so defensive, and even when we did come up with an idea, we needed to change some people’s schedules to make it happen and no one would support us in this.”

- A quality improvement project facilitator

9 Interdisciplinary Work

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First and foremost, teams need committed people. On the most successful teams, these people come from a wide variety of disciplines and bring a broad set of skills to the table. Teams need the support of leaders in the organization to get off the ground and to maintain momentum.

Listen to the experience of one person who worked on a team project at a health care organization.

“It was so frustrating. We had all these meetings, but we couldn’t ever agree on what to do. Some people were so defensive, and even when we did come up with an idea, we needed to change some people’s schedules to make it happen and no one would support us in this.”

Have you had an experience like this? Does it “ring true” to you? Have you ever become frustrated because of interpersonal or logistical barriers?

Why Does Support from the Top Matter?



Senior leadership support is especially critical to a team's success because it helps the team:

- Feel their work is valued and important
- Have appropriate empowerment to complete tasks
- Learn how to work together

These obstacles will appear in the path of any team.... Teams with support from senior leadership will be able to get past them.

Not only can senior leaders give symbolic importance to the quality team, but their support may be required for a challenge so concrete as getting a room for the team to meet in or making time in a busy daily schedule.

Teams need to feel their work is valued and important, they need authority to take time from their regular job responsibilities to meet and do team tasks, and they need support in learning how to work together as a team.

Working Across Disciplines

Who knows what really goes on, day-to-day, in your clinic?



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Other than senior leaders, who else should be involved?

Think about your own HIV program. Who knows what is really happening?

The doctors, of course, because they see the patients.

The clinic manager, I mean, she's in charge, right?

The social workers are the only ones who ever really talk to the clients.

The nurses are the only ones who ever really talk to the clients.

The front desk workers, they see everything.

Do all of these people really know what everyone else is doing?

In most organizations, each person knows his or her own area pretty well, but very few people understand what happens in the work of others. To get a full picture, we need everyone involved.

Teams Need Qualified People

“Teams need people with the knowledge and skills necessary to accomplish their tasks.”

Quick Tip:

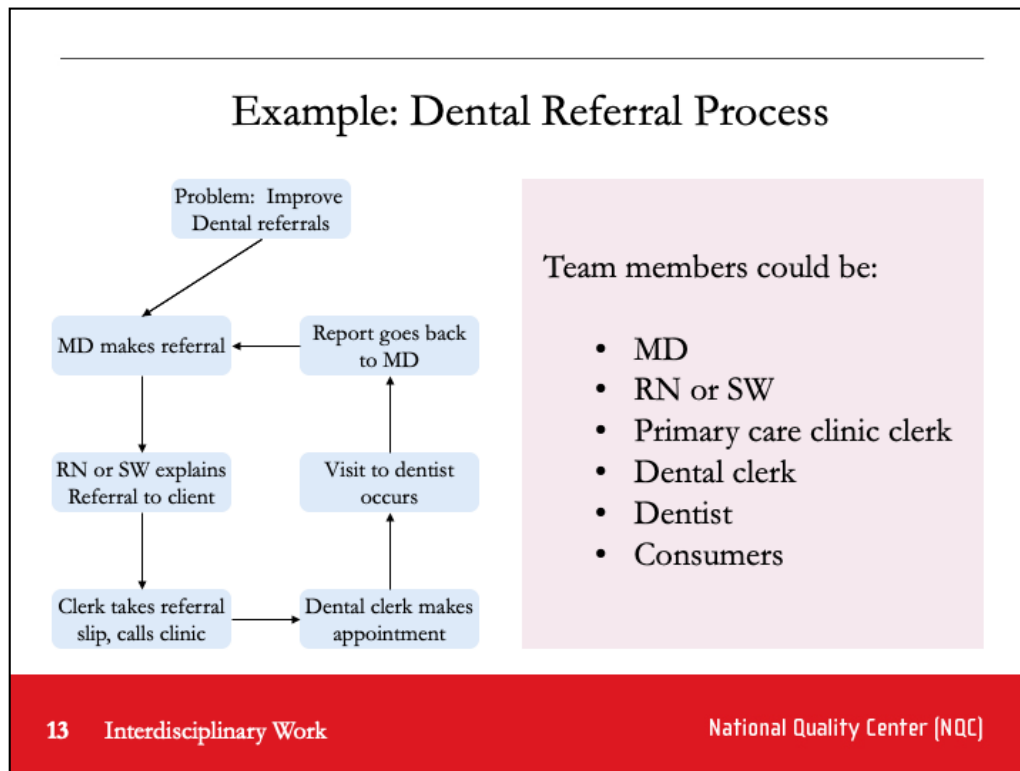
- How do you know who should be on a team?
- Draw a simple flowchart of the process you’re working on
- Make sure someone who works in each box is part of your team

If a team is going to be working on an improvement project, it needs members who understand the process the team is aiming to improve.

Here’s a quick way to identify the right team members.

Draw a very simple flowchart of the process you’re working on. Do not exceed 6 boxes maximum as teams that are larger than this begin to lose effectiveness.

Then make sure someone who works in each box is on the team.



Here's an example, with a team working to improve the process for dental referrals. Representatives from each block would form a very effective team to tackle this problem. In this example, team members could be the following.

Notice how we keep our team to 6 or fewer to maximize effectiveness.

Others with specific knowledge can answer the team's questions if such questions arise, but they don't need to be a permanent part of the team.

Remember, small, representative teams are your goal.

Answers	
<p><u>Yes</u></p> <ul style="list-style-type: none"> • Receptionist • Primary care doctor • Nurse 	<p><u>No</u></p> <ul style="list-style-type: none"> • CEO • Pulmonologist
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The best answers are:

CEO: no. It is unlikely the CEO will know how PPDs are placed and read in your HIV program.

Receptionist: yes. He or she works with those who come in for readings and knows the way the readings take place.

Primary care doctor: yes. He or she will know the issues the providers face in ordering PPDs.

Nurse: yes. He or she most likely reads the PPDs.

Pulmonologist: no. This physician is not involved in the screening process.

Team Roles



- Leader
- Facilitator
- Member
- Timekeeper
- Recorder

Once you have decided who will be on the team, you need to decide how the team will function.

Teams of any size have five key roles:

- Someone to lead the team
- Someone to facilitate the team's work and work process
- Team members, who contribute to the work of the team
- A timekeeper who helps the team manage time; and
- A recorder, who keeps the meeting notes.

Team Responsibilities

- **Leader:** first among equals; guides the team and represents its work
- **Facilitator:** coach, helps keep things working well
- **Member:** equal participant, provides information and helps make good decisions
- **Timekeeper** and **Recorder:** rotating roles to help with meetings and record-keeping

Let's talk a bit more about each role.

- On a team, the leader plays a “first among equals” role. While he or she needs to coordinate the work of the team and represent it to senior management and others, the team leader need not be the most senior or knowledgeable team member. His or her opinion matters no more than any other team member.
- A facilitator acts as a coach, advising the team and helping it function well. Sometimes, facilitators receive special training. Other times, they just are a neutral voice who can help keep the team on-track. Facilitators make sure the decisions are made fairly and well, with everyone contributing.
- Team members all participate equally, with each one having the responsibility to provide information and opinions about the best courses of action.
- Timekeeping and recording responsibilities can rotate among members from meeting to meeting. Everyone should share in these important tasks.

Keep in mind effective team functioning becomes everyone's responsibility.

Real World Tips: Making the Team

- Include at least one member of the HIV quality committee on your project team
- Choose an experienced facilitator
- Include a consumer
- Take participant interests into account when assigning tasks or projects

Here are a few more things to think about when forming a team.

Include at least one member of the HIV quality committee on your project team.

Keeping everyone on track and working cooperatively is challenging, so choose an experienced facilitator.

It's also a good idea to include a consumer on the team.

Remember to take participant interests into account when assigning tasks or projects. You don't want people to dread their team work experience or they may not perform as well as they could.

Keep in mind that improvement teams, which are the vehicles of quality improvement activities, meld together the skills, experiences and insights of different staff.

Teams Grow and Develop Over Time

- **Forming:** getting to know each other. Teams will be cautious and polite
- **Storming:** it's starting to get real. Team members will protect their point of view
- **Norming:** beginning to trust each other. Teams will begin to cohere and really work together
- **Performing:** progress! And team satisfaction

No matter how well-chosen members are or how roles are assigned, a team formed last week will not function like a team that has been collaborating for years: teams have a life cycle. Researchers have shown that teams exhibit four clear phases of growth:

- Forming comes at the beginning of a team's life. Not much gets accomplished, because people are being very careful with each other.
- Storming is sort of like adolescence. It's a time of stress. People know each other well enough to begin to disagree, but their focus remains on protecting themselves and their colleagues. Lots of disagreements can result.
- Norming is when things begin to calm down. People begin to trust each other and to feel loyal to the team and want it to succeed. This is when the team begins to hum.
- And, as it makes progress and feels a sense of accomplishment, the team begins performing.

What Helps?

- Understanding the stages
- Having a clear purpose
- Using team working tools



It is unlikely that the evolution of a team through these stages will always be smooth. However, making sure that everyone on the team has an understanding of these stages may help the team progress through them and, eventually, achieve. Especially when teams are in the “storming” phase, they may become frustrated at their lack of progress. Understanding that this is OK and expected may lower the tension enough to allow teams to proceed to “norming.”

Teams cohere around their purpose and goal (sound familiar?), and so the clearer these are, the easier it will be for teams to move along the stages of growth.

Using tools that help groups of people share ideas and come to conclusions – tools like brainstorming – can also help.

Brainstorming: Tool for Generating Ideas



- Ask an open-ended question
- Everyone provides an idea, in turn
- No criticism
- Each idea gets written down
- Keep up a good pace, ideas will build on each other
- Take a look: what can we further develop?

Brainstorming is a useful tool for teams that want to have everyone participate in generating possible answers to a question, or solutions to a problem.

The steps are straightforward:

- Begin with an open-ended question – for example, “why might our clients be no-shows for their appointments?”
- Go around the room and each person offers one idea in turn. They can pass if they must, but it’s better if everyone contributes.
- No criticism of an idea is allowed. Every idea has value.
- The recorder writes down each idea, preferably where the rest of the team can see it: on a flip chart or blackboard.
- Keep going until all ideas are exhausted. The hope is that the ideas will build on each other, so try to keep a good pace going, to keep people excited about participating and developing potential solutions.
- When there are no more ideas, step back and look at what’s been suggested. Do the ideas fall into categories? Are there duplicates? Which do we think we can further develop?

Teams Work Best When



- Limited to 5 or 6 members
- Members can meet without logistical headaches
- Meetings are on target and succinct
- Meetings have a clear agenda
- Notes are kept and reviewed

Other than being clear on the stages, you can help your team by being efficient. Here are a few tips that will help all members feel that they are contributing and that meetings are an effective use of their time.

Teams work best when they're not too big. 5 or 6 members is best. The size of teams matters. Make sure your teams aren't too large – 8 members is a maximum, but smaller is better.

Teams also work best when members can meet without logistical headaches. They need a quiet place, chairs and a table, and time away from their work. Health care organizations aren't set up for a lot of meetings, and good meeting space can be hard to find. Make the effort to find it, and help teams work without distraction as much as you can.

It's important that meetings start on time, end on time, and proceed without interruption. Remember, everyone has a job to do so stay on target.

Meetings should run according to a previously planned agenda. Meeting notes and next steps are distributed to participants. If you do not have a prepared agenda, take a few minutes at the beginning of the meeting and prepare one on the spot.

The recorder takes notes on action items during the meeting and reviews action items at

the end of the meeting. Copy and distribute as the meeting ends so all are clear on who is supposed to do what.

More Tips for Success

- State your aim at the beginning of every meeting; post it in the meeting room
- Clarify what the team should be doing (we can't say this often enough)
- "Leave your titles at the door"--try to use first names
- Encourage the team to celebrate their achievements

In closing, here are a few more tips to help teams achieve their goals.

Teams need clear direction. Go to Tutorial 12 for more information on how the Model for Improvement can help clarify team goals.

"Leave your titles at the door"---try to use first names. A team meeting is an occasion for collaboration among equals.

Celebrating success is tremendously important. Everyone needs to know they've done a good job – and seeing one team's celebration will make others more willing to participate in future teams. Having a chance to present results to others, recognition in staff meetings, posters up on the wall – all these are ways to publicize the good work done by a team. Parties are nice, too.

Key Points

- Teams outperform individuals in settings like those that provide HIV care
- In order to work well, teams need direction and resources from their organizations
- Having clearly-defined roles and responsibilities helps too
- Teams go through recognized stages of growth; some conflict is to be expected
- Team-working tools can help teams succeed

Let's look at what we've learned today.

- Teams outperform individuals when the task is complex or requires creative thinking, when there's a need for efficiency, or speed, and when commitment is needed across disciplines and departments – just the situation most HIV programs face.
- Teams can't exist in a vacuum and need support and resources from their organizations, especially from senior leadership.
- It is important to have clearly-defined team roles and responsibilities to help teams perform well.
- Remember, teams go through recognized stages of growth so some conflict is to be expected. Stick with your team and they will work through the adolescent stages and mature into a performing team with time.
- Team-work tools like brainstorming will help your teams get past hurdles and come up with creative solutions to challenging problems.

Resources

- Scholtes, Peter R., *The Team Handbook*. For more information see: <http://www.orielinc.com/prod.tth3.cfm>
- Tools for Grantees from the Health Resource and Service Administration's HIV/AIDS Bureau: <http://hab.hrsa.gov/tools.htm>

The Team Handbook is one of the best sources for information on teams and team working. You can learn more about this valuable resource by going to www.orielinc.com. You can find other tools for grantees from the HRSA HIV/AIDS Bureau website by clicking this link.

And, as always, you can also contact the National Quality Center for more help, at www.NationalQualityCenter.org

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For further information, contact:

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This concludes our training session for now. As you can see, there is a lot to learn about improving quality. If you have not done so yet, please check out the other training resources we have available for you. Each Tutorial is just a piece of a larger puzzle. You will need all of the information to truly understand how your organization can create a successful quality management plan. You can also contact us here, email us here or visit us online here. Thank you for your time today and we look forward to hearing from you soon.