Project Step 2: Develop A Project Team.

Program Cycle

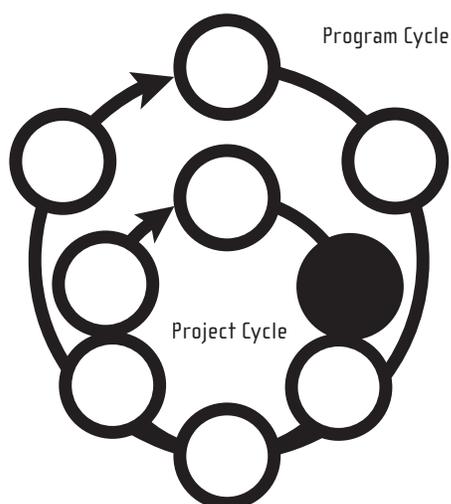Project Cycle

The Big Picture

Team members gear up for the project at hand during Project Step 2. They become familiar with their individual roles and responsibilities and determine how they will work together during the project. As a team they write an improvement project memo to define their direction and scope of work and they strategize about key tasks and time-lines ahead of them.

What To Do

- Establish project team dynamics.
- Write an improvement project memo.

📷 Snapshot of HIV Care

Creating teams that work

"Not another committee meeting to go to." A frequent response of over-worked, stressed health care providers.

How can quality managers create quality improvement project teams that break out of the facility's committee routine and establish quality improvement project teams that are effective vehicles for quality improvement? Quality managers report using many strategies.

Involve new staff and consumers in project teams

Involve new people. "Don't focus on the 'usual suspects' when establishing a project team," suggests on program manager. "Too often, we look to the same people to serve on committees. Because of they're over-extended, we don't get the type of participation we need." Project team members should be selected because they will bring a needed skill or insight to the improvement process. "This isn't about business as usual. It's about changing the usual."

Develop
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📷 Snapshot of HIV Care...*Continued*

Administrative and support staff who aren't usually involved in the management functions of the facility should be included in the project team. Their experiences and perspective may lead to an "oh my gosh" moment—the realization of how processes actually work in "real life,"

Consumers can also be involved in project teams. You may need to provide some training and support to facilitate consumers' effective involvement in the team, but their perspective can often be important to the team's work. Try mentoring consumers in the role—pair an experienced consumer with someone who hasn't yet been involved.

Establish expectations of participation. Project team members need to know their roles and responsibilities and understanding that all members are expected to participate. "We started off our first meeting by telling team members that everyone was going to be active. No benchwarmers here," reports one project team leader. "While it was my responsibility to keep everyone on track, my team members also developed the understanding that if we all worked together, we were more likely to complete our work on schedule, implement our improvements, and get back to work!"

New leadership should be involved in the project teams. Don't rely on the same individuals to provide leadership to the team – the Medical Director does not have to be the leader in each team. Establish a process for mentoring future project team leaders by purposively involving new people in leadership roles. Provide training and support so they can assume independent leadership roles in the future.

Focus the team's work

Clearly outline the work of the team. Defining the goal of the team and creating a workplan gets everyone on-board quickly and creates an understanding of what needs to be done. However, the goal needs to be focused and achievable. Kay Scott at St. John's River-side Hospital, Yonkers, NY reports that their initial improvement goal was to "go global" and created a plan that had great ideas but "was too ambitious." By starting with narrow and focused efforts, Scott reports that they were able to achieve much more than that had anticipated.

Multi-site facilities can create multiple teams—each working on their own project or working on the same cross-site project. Unity Health Care in Washington, DC, a multi-site community health center, has site-specific quality project teams that work on their projects. They participate in cross-site meetings to report their work and share their experiences. This structures works because it fits into the overall corporate structure where responsibility for clinic operations is decentralized to each site.

Establish Project Team Dynamics.

HIV project improvement teams, vehicles of quality improvement activities, meld together the skills, experiences and insights of different staff. Each team will have some unique combination of people, improvement goals and performance measures.

Successful outcomes of improvement projects result most often when a team has clear objectives to guide their activities, the necessary resources to complete project work, support of the quality committee, and the willingness of team members to learn from each other and maintain open communication with the quality committee, staff and consumers.

Defining Roles And Responsibilities

Effective team functioning becomes everyone's responsibility. Team members should take time at the beginning of the project to get acquainted with team members' roles and responsibilities and agree upon how the team will function to get work done.

- Team leader: Someone who fully understands HIV care delivery issues needs to be on the team as team leader. The person selected as team leader also understands the entire breadth of the improvement project so he or she can effectively plan and lead team meetings.

- Team facilitator: Team leaders may wear two hats and also serve as the team facilitator. Generally, the facilitator assists the team leader in planning meetings and developing agendas. A facilitator also tends to the meeting process, for example, ensuring that everyone participates, and helps keep participants on track with the agenda and scheduled times.

- Team member: Team members reflect the range of functions and departments involved in the process being improved in order to build and maintain consensus from key individuals on the solutions to the problems. They should also have intimate knowledge of the process, personal involvement and interest.

The quality committee usually assigns staff members to serve as the team leader and team facilitator for a quality improvement team. Improvement team members can be selected by either the quality committee or by the team leader.

The Toolbox on page 97 chart further illustrates the roles and responsibilities for an improvement project team.

Preparing Teams To Do Work

In the initial phase of an improvement project, the team leader and/or facilitator serve as the driving force to build effective relationships between team members and ensure everyone understands the team's assignment.

The team leader and/or team facilitator ensure team members know each other and recognize how members can complement each other through their expertise and perspectives. Any educational training to successfully start the improvement project is provided by the team leader and/or team facilitator. Team members' experience and the specific nature of the project will dictate the appropriate level of necessary team-building and training.

Real-World Tip
Launch A Team With Purpose.

Whether an improvement project is small or large, simple or complex, the following suggestions can help a team to successfully complete a project:

- Include a quality committee member on the team.
- Involve additional staff who is willing to participate; ask for volunteers.
- Rotate functions of the team.
- Start with a presentation of a successful quality improvement project.
- Generate enthusiasm and excitement at the first team meeting; explain why the work is important or how staff and consumers will benefit.
- Explain the potential for change and limitations early on to explain the project's framework.
- Rotate the role of recorder and timekeeper among team members.
- Include an engaged consumer on the team and be proactive preparing the consumer.

Additional Resource

For guidance in teaching small groups about the roles and responsibilities of project team members, see the HIVQUAL Group Learning Guide "Team Roles" exercise. The exercise could also be used as an ice breaker for the project team's first meeting. You can download this publication at www.hivqual.org.

🧰 Toolbox:
Team Roles for an Improvement Project

Team leader: Lindsey Cabrelli, R.N., Director of Operations

Team member: Bruce Dixon, Medical Liaison (Team facilitator)

Angelique Martinez, Clerk

Michael Sappal, Case Manager

Lan Huong, Staff R.N.

Gloria, Consumer

Recorder and timekeeper: To be rotated among team members

Updated: October 31, 2005 by Cheryl March, R.N.

TEAM RESPONSIBILITIES	TEAM LEADER	TEAM FACILITATOR	TEAM MEMBER
Provide direction and focus to team activities	X		
Ensure productive use of team members' time		X	
Represent team to clinic management and quality committee	X		
Facilitate team meetings		X	
Ensure balanced participation by all team members		X	
Provide feedback and support to team leader		X	
Suggest problem-solving tools and techniques	X	X	X
Offer perspective and ideas and participate actively	X	X	X
Adhere to meeting ground rules	X	X	X
Complete assignments on time	X	X	X
Support implementation of recommendations	X	X	X
Keep up-to-date on QI training, research and methods	X	X	
Manage the team's time	X	X	
Take and distribute minutes of meetings			X

Develop
Project Team

Write An Improvement Project Memo.

An improvement project memo serves as a project blueprint. Teams develop memos to help ensure that all members work toward the same goals according to a single set of operational guidelines. Completion of the improvement project memo is important to:

- Clarify and focus the team's direction and scope of work.
- Create a standard document for communicating what the project is, what it intends to accomplish, when it is likely to be completed, and who is responsible for the project implementation.
- Refocus team efforts if a team gets stuck on a specific issue.
- Educate new team members coming on board during the project cycle and getting those individuals up to speed.

An improvement project memo typically includes:

- Problem statement
- Improvement goal
- Team leader and team members
- Other (resources, authority, frequency of reporting, ground rules)

The improvement project memo may evolve and change over time as new information and data analysis results become available or additional knowledge is gained. Consider the memo a 'living document.'

For example, a team may increase a target improvement goal from 70% to 85% as information and data substantiate the new goal can be realistically achieved.

The Toolbox on page 99 provides a sample Improvement Project Memo that teams can easily modify to suit their specific purposes.

Defining A Project Problem Statement

A problem statement describes the problem to be addressed. It should:

- Be stated in concrete terms—terms that clearly describe the problem to be addressed.
- Include quantifiable numbers that indicate the current level of performance (e.g., "Currently 60 percent of women in the HIV clinic receive annual GYN exams.")
- Be relevant to HIV care and services provided by the facility.

Real-World Tip
Keep The Memo Purpose Aligned.

The following fundamentals are helpful in drafting an improvement project memo:

- Ask for input from facility leaders or the HIV committee in writing the memo to gain their buy-in.
- If necessary, redefine the goals over time.
- Communicate the memo to others; email to all staff and post in visible places for consumers.
- Make it simple.

🧰 Toolbox:
Improvement Project Memo

PROJECT START DATE:	October 22, 2005
COMPLETION DATE:	April 15, 2006
INDICATOR:	PCP prophylaxis
PROBLEM STATEMENT:	Currently, only 65% of patients with CD4 count less than 200 receive appropriate PCP prophylaxis, compared to the state-wide average of 92%. In the last year the performance rate declined by 31%.
IMPROVEMENT GOAL:	The team will work to improve the clinic's performance on this important prevention measure. The team should focus on increasing the number of patients with CD4 count less than 200 receiving appropriate PCP prophylaxis to 95% and above.
TEAM MEMBER:	Ann Cavanaugh, C.S.W. (team leader) Peter Brown Paul Sabo, M.D. Santiago Rodriguez Helen Kearney Cheryl March, R.N.
OTHER: (RESOURCES, AUTHORITY, FREQUENCY OF REPORTING, GROUND RULES)	Team will be given time to meet. There's money for supplies or other similar expenses, but not for additional staff. Mac Martin (MIS department) will be available to help with data analysis. Team members should give a verbal report at the next quality committee meeting, November 15. All team members should be on time and no excuses.

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Defining A Project Goal

Effective teams work with clearly defined goals. There is some debate on how high to set the goal: an achievable, realistic or a "stretch" goal. A basic guideline would be: set the goal and then continue making changes until the level is reached at which the effort expended is too great for the gain. In other words, the value of meeting the goal should exceed the cost of doing so.

A good project goal clearly sets forth a goal that is measurable and achievable. The following template can be used in formulating the goal statement: "The team will work to improve the clinic's performance on the (name of the indicator) indicator. The team should focus on (action verb) the number of patients who (state the desired result). Currently, our performance is (percentage). The team should aim to improve this performance to (percentage)."

See the Toolbox on page 99 for a completed example of an Improvement Project Memo.

Setting Team Expectations

Team members should discuss and agree upon ground rules. Ground rules or team norms are what team members can expect from each other. Examples include:
- Agree to start on time and end on time.
- Frequency of meetings, length and time.
- Regular attendance.

An example of team ground rules developed by one HIV clinic is shown in the Toolbox on page 101.

Because the improvement project memo serves as a project blueprint everyone on the team needs to review it and agree on the content. When the team has reached consensus about the improvement project memo, it is submitted to the HIV quality committee for final review.

The project team is ready to get started. A workplan is sometimes used to provide a road map for a team to complete its work. Consider developing a Gantt chart for the improvement project as illustrated in the Toolbox on page 102.

Additional Resource

For guidance in teaching small groups about the purpose and primary elements of an Improvement Project Memo, see the HIVQUAL Group Learning Guide "Improvement Project Memo" exercise. You can download this publication at www.hivqual.org.

🧰 Toolbox:
Team Ground Rules

MEMBERS OF THE PERFORMANCE IMPROVEMENT PROJECT TEAM AGREE ON THE FOLLOWING:	
1.	Meeting will start and end on time.
2.	All opinions will be considered with respect.
3.	Meetings will last 45 - 60 minutes and not longer!
4.	Meetings will be held in the group room.
5.	Meetings will be held in an atmostphere that will encourage team members to share their perspectives.
6.	Team members given assignments between meetings will complete their task on time.
7.	All team members will attend meetings on a regular basis.
8.	Team members will inform other team members one week in advance (if possible) of unavoidable absence from scheduled meetings.

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🧰 Toolbox:
Gantt Chart

DESCRIPTION	• Graphically displays activities (including roles and responsibilities) in sequential order plotted over time • Depicts when each activity in a project must start and finish • Shows which activities can be accomplished concurrently • Shows the relative amount of time required to complete an activity • Presents the minimum time needed to complete an improvement project
USE	• To plan an improvement project • To monitor the progress of an improvement project
BASIC CONSTRUCTION	1. Identify all the activities that are necessary to complete an improvement project. (Note that these activities are not necessarily related.) 2. Identify the time required for each activity. 3. Identify the sequence of activities (e.g., which ones must be finished before another can begin and which can occur simultaneously). 4. Construct a horizontal timeline along the top axis; mark the appropriate scale for the project duration (e.g., days, weeks, or months). 5. List the project activities on the left vertical axis in order along with responsibility. 6. Mark the period of time from the planned beginning to the planned end for each activity.

Gantt Chart Example: Self Management Program

Implementation Plan of a Self-Management Program to empower patients to become informed and active participants in our health care delivery system.

ACTIVITY	RESPONSIBILITY	WEEKS								
		1	2	3	4	5	6	7	8	9
Collect current written materials about self-management	Mary	X	X							
Prepare presentation and draft educational materials	Mary		X	X						
Discuss at quality management committee	Pat			X						
Discuss with consumer advisory board	Hal			X						
Establish team with providers and consumers	Pat			X	X					
Formulate clear objectives and staff expectations	Mary				X	X	X			
Present at staff meeting	Pat					X				
Implement self-management program with one provider	Jack					X	X	X	X	X
Establish indicator to measure performance	Mary							X	X	
Review new self-management program articles	Pat								X	X