



Family & Community Medicine
UNIVERSITY OF TORONTO

Team Form

QUALITY IMPROVEMENT

CONFLICT AND DISCLOSURE INFORMATION

Speaker:

Program:

Financial Disclosure:

Other:

LEARNING OBJECTIVES

After engaging in this session, you will be able to:

- Define the concept of team
- Differentiate stages of team development
- Identify stakeholders in your QI initiative.
- Perform a stakeholder analysis.
- Strategize engagement of stakeholders.
- Describe the roles needed on your QI team.
- Select your QI Team

DEFINE “TEAM”

A team is a small number of people
with complementary skills,
committed to a common purpose,
a set of performance goals,
and an approach for which they hold
themselves mutually accountable.

DEFINE “TEAM”

Leadership is shared –
at different times each member of the team
may demonstrate a leadership role,
NOT
a single hierarchal leader as authority figure.

DEFINE “TEAM”

Members are responsible to each other, and see the team as accountable for the work products,

NOT

responsible to an outside authority and accountable only for “their own thing”.

DEFINE “TEAM”

Teams have meetings that encourage lively, open-ended discussion and active problem solving,

NOT

“efficient” meetings with tightly controlled agendas.

DEFINE “TEAM”

Teams discuss, decide, and
do the real work together,

NOT

discuss, decide and delegate the work.

DEFINE “TEAM”

Teams provide collective work products
where credit is shared,

NOT

work products where
individuals take sole credit for their portion.

A TEAM EVOLVES

What is the “life cycle” of a team?

LIFE CYCLE OF A TEAM

- Form
- Storm
- Norm
- Perform
- Transform
- Adjour



LIFE CYCLE OF A TEAM

Form: Build Relationships

Teams are motivated but uninformed.

- Gather the right people.
- Assess roles.
- Avoid conflict & controversy.
- Perform stakeholder analysis.
- Create acceptance through mutual respect.



LIFE CYCLE OF A TEAM

Storm: Team Growth

Teams are confronting differing ideas and perspectives.

- Demonstrate professional standards.
- Resolve conflict effectively.



LIFE CYCLE OF A TEAM

Norm: Develop Work Plan

Teams are letting go of individual goals.

- Establish team goals.
 - **S**pecific
 - **M**easurable
 - **A**ttainable
 - **R**elevant
 - **T**ime-bound
- Negotiate contributions.



LIFE CYCLE OF A TEAM

Perform: Action!

Make your meetings work!

- Caring
- Confronting
- Catalyzing



LIFE CYCLE OF A TEAM

Transform: Action!

A knowledge-creating team.

- Synergy: Team actions exceed individual capabilities.
- The team learns from within.

LIFE CYCLE OF A TEAM

Adjourn: Legacy of team

Team's performance sets the standard for the next team.

- Celebrate your accomplishments.
- Let go; move on.



ARE YOU PART OF A TEAM?

Think of three teams
you are on.



ARE YOU PART OF A TEAM?

Where are those
teams currently in their
life cycle?



FORM YOUR QI TEAM

1. Identify stakeholders.
2. Complete stakeholder analysis.
3. Strategize stakeholder relations.
4. Describe roles needed for this QI initiative.
5. Select your current QI team.



1. IDENTIFY STAKEHOLDERS

A stakeholder is:

any person or group that can claim the project's attention, resources or its deliverables, or is affected by its output.



1. IDENTIFY STAKEHOLDERS

- Stakeholders may or may not be part of your organization.
- Your QI project team will be a subset of your stakeholders.



1. IDENTIFY STAKEHOLDERS

- I. Patrons of QI initiative.
- II. Users of QI initiative.
- III. Advisors on QI initiative.
- IV. Specialists for QI initiative.



1. IDENTIFY STAKEHOLDERS

I. Patrons of QI Initiative

- Sponsors
 - Have authority
 - Validate project
 - Provide resources
 - e.g. Executive Director of Community Health Centre
- Champions
 - Passionate & enabling
 - Represent users
 - e.g. you



1. IDENTIFY STAKEHOLDERS

II. Users of QI Initiative

- Benefit from successful outcomes of QI project.
 - Directly or indirectly
- Includes patients and their families.



1. IDENTIFY STAKEHOLDERS

III. Advisors on QI Initiative

- Experts on subjects within the scope of the project.
- e.g. individual with QI experience



1. IDENTIFY STAKEHOLDERS

IV. Specialists for QI Initiative

- Have unique skills that contribute to products of the project.
- e.g. form designer, IT expert



1. IDENTIFY STAKEHOLDERS

- a) Brainstorm to develop list of stakeholders.
- b) Establish their profiles:
 - Name
 - Reporting relationship
 - Characteristics:
 - i. Roles & responsibilities
 - ii. Interest in outcome
 - iii. Special skill set
 - iv. Contribution:
Power or Influence / Support / Expertise /
Need



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1. IDENTIFY STAKEHOLDERS

For your QI opportunity:

- Identify your project's stakeholders.



1. IDENTIFY STAKEHOLDERS

Let's review a couple of examples.



2. COMPLETE STAKEHOLDER ANALYSIS

STAKEHOLDER ANALYSIS					
Name	Role	<i>Power and Influence</i>	<i>Support and Commitment</i>	<i>Skill Set or Expertise</i>	<i>Need for/ Vested Interest in</i>
		Jane Doe	QI Consultant		
Dr. Bigwig	CEO				
Dr. John Smith	Partner in Practice				
Patient A	Patient				

2. COMPLETE STAKEHOLDER ANALYSIS

Support and Commitment
Power and Influence
Skill Set or Expertise
Need for/ Vested Interest in

Jane Doe QI Consultant



- Has no real power or influence on the project.
- Supportive of the project and recognizes urgency.
- Has required expertise needed for the project.
- Has nothing to gain or lose at outcome of the project.

2. COMPLETE STAKEHOLDER ANALYSIS

Support and Commitment
Power and Influence
Skill Set or Expertise
Need for/ Vested Interest in

Dr. Bigwig



- Has ability to influence others.
- Limited buy in, has bigger concerns elsewhere.
- Not knowledgeable in this area.
- Not likely to be affected if project succeeds or fails.



2. COMPLETE STAKEHOLDER ANALYSIS

Support and Commitment
Power and Influence
Skill Set or Expertise
Need for/ Vested Interest in

Dr. John Smith

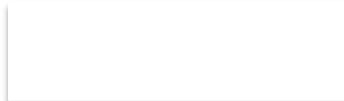


- Interested but has limited resources.
- Committed, but concerned changes may result in new issues.
- Not proficient in this area.
- Has a stake in the project and is interested in its success.

2. COMPLETE STAKEHOLDER ANALYSIS

Support and Commitment
Power and Influence
Skill Set or Expertise
Need for/ Vested Interest in

Patient A



- No influence or power.
- Supportive of change and sees the benefits.
- Not proficient in this area.
- Has a stake in the project and will directly benefit from its success.



2. COMPLETE STAKEHOLDER ANALYSIS

STAKEHOLDER ANALYSIS					
Name	Role				
		<i>Power and Influence</i>	<i>Support and Commitment</i>	<i>Skill Set or Expertise</i>	<i>Need for/ Vested Interest in</i>
Jane Doe	QI Consultant	2	5	4	1
Dr. Bigwig	CEO	5	1	1	1
Dr. John Smith	Partner in Practice	4	3	1	3
Patient A	Patient	1	4	1	5

Who must be further engaged in the QI initiative?

Do you need to develop a communication strategy for some stakeholders?

2. COMPLETE STAKEHOLDER ANALYSIS

For your QI opportunity:

- Conduct a stakeholder analysis.



2. COMPLETE STAKEHOLDER ANALYSIS



3. STRATEGIZE

Engage stakeholders to:

- Get the right people on, and behind, the project.
- Help manage relationships.
- Plan communications, initially and ongoing.
- Optimize project outcomes.



3. STRATEGIZE

1. Who do you want to maintain linkages with, although they are not on the team?
2. Who do you have to contain as a possible adversary to your project?
3. Who do you want on your team?

3. STRATEGIZE

1. Who do you want to maintain linkages with, although they are not on the team?
 - Individuals who would have been great to have on the team, yet unable or unwilling to commit
 - Stakeholders with power or influence
 - Need a communication strategy

3. STRATEGIZE

2. Who do you have to contain as a possible adversary to your project?

- Identify source of resistance if possible
- Develop a communication plan
- Use data to support your position
- Strategize to build your power base

3. STRATEGIZE

3. Who do you want on your team?

- Members representing a balanced skill set as per your analysis
- Agreeable personalities
- Members who are prepared to make a commitment to participate
- Members who are not “oversubscribed” to a lot of project activity

4. DESCRIBE ROLES NEEDED ON TEAM

Exploring Professional Roles

- Team settings
 - Overlapping competencies; shared responsibilities
- Overlapping scopes of practice
 - Confusion
 - Ineffective teams
- Knowledge of roles of other health professionals
 - Required to practise collaboratively
- Clarifying scopes
 - Understanding roles in a team setting



4. DESCRIBE ROLES NEEDED ON TEAM

In a CHC, think:

Nurse

Administrative
staff

Patients

Allied
professional

Physician



4. DESCRIBE ROLES NEEDED ON TEAM

Consider:

- Regulated Health Disciplines



4. DESCRIBE ROLES NEEDED ON TEAM

- Audiologist
- Chiropodist
- Chiropractor
- Dental Hygienist
- Dental Surgeon
- Dental Technologist
- Denturist
- Dietician
- Massage Therapist
- Medical Laboratory Technologist
- Medical Radiation Technologist
- Midwife
- Naturopath/Drugless Practitioner
- Nurse
- Occupational Therapist
- Optician
- Optometrist
- Pharmacist
- Physician and Surgeon
- Physiotherapist
- Psychologist
- Respiratory Therapist
- Speech Language Pathologist
- Veterinarian



4. DESCRIBE ROLES NEEDED ON TEAM

Consider:

- Regulated Health Professionals
- Others with whom you work



4. DESCRIBE ROLES NEEDED ON TEAM

- Social work
- Health promoter
- Spiritual leader
- Industrial engineer
- IT, Informatics
- Cleaning staff

. . . etc. . .



4. DESCRIBE ROLES NEEDED ON TEAM

For your QI opportunity:

- Is there anyone you forgot?



5. SELECT YOUR QI TEAM

On your team, make sure you have:

- A diversity of roles, and
- Stakeholders who:
 - Have power and/or influence.
 - Support the QI initiative.
 - Have relevant expertise to offer.
 - Need the project to succeed.

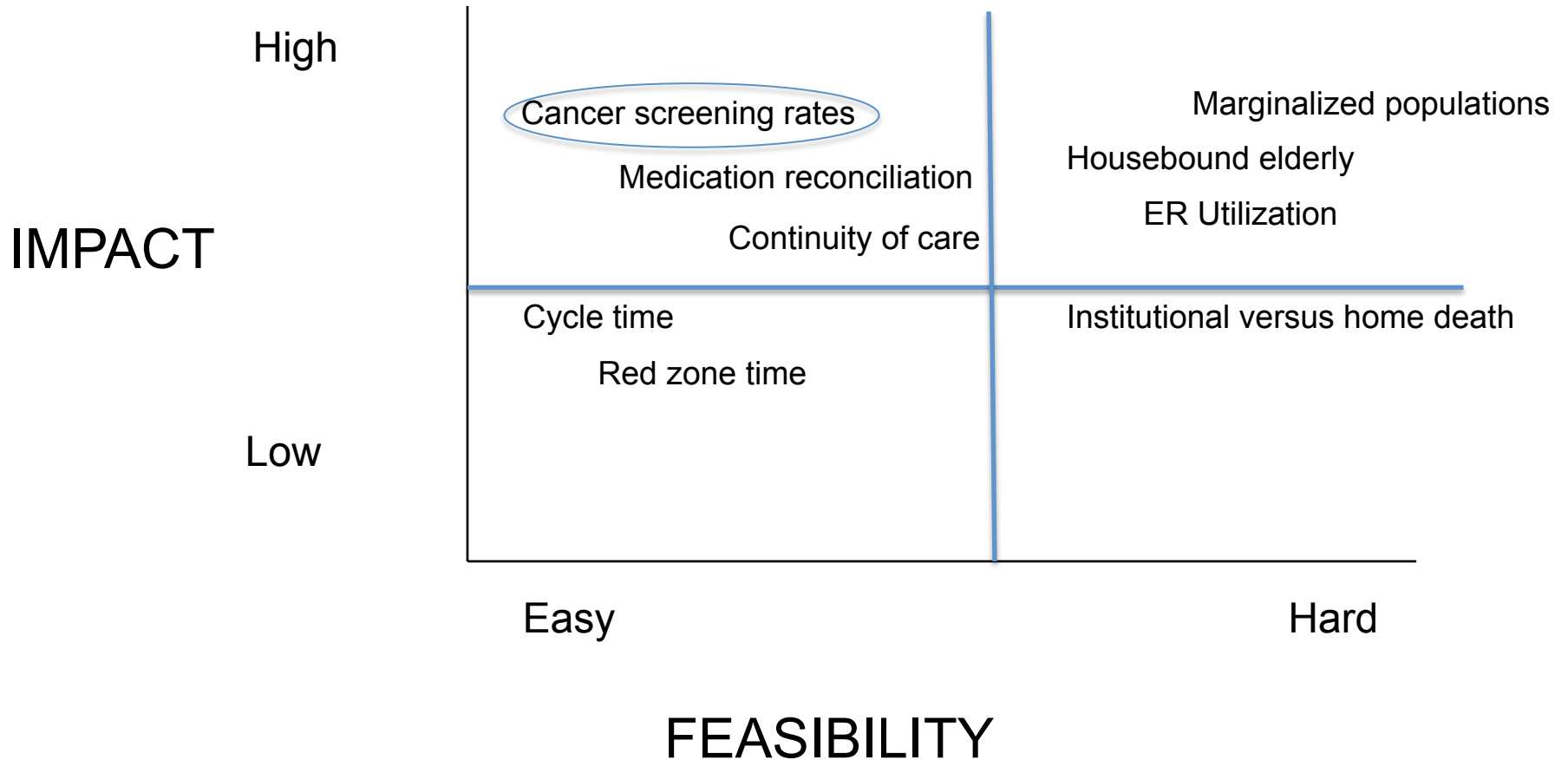


5. SELECT YOUR QI TEAM

- List all the stakeholders to your QI initiative
- Identify a team for your QI initiative.
- Describe the roles each will play.



RECALL OUR CASE STUDY



WHO WOULD BE STAKEHOLDERS?

- Patients eligible for screening and/or families touched by cancer
- All physicians
- Other clinical professionals who have an interest
- Informatics – IT – get data out, possible define data input standards, develop reminder systems
- Administrative staff – records, appointments
- Health promoter – practice or community based
- CCO regional cancer lead

PROFILE AND ANALYZE THE STAKEHOLDERS

Name

Reporting relationship

Characteristics:

- Roles & responsibilities
- Rank contribution:
 - Power or Influence e.g. CCO lead
 - Support – e.g. Health promoter
 - Expertise – e.g. Informatics expert
 - Need – e.g. Physician (incentives) and patient (+ FH of cancer)
- (Stage of Change)

SO, NOW YOU KNOW:

What makes for an effective team
The different stages of team development.

How to identify, analyze and strategize the engagement of stakeholders.

The roles and scopes of the various professionals in family practice.

How to select a diverse, complementary team.



QUESTIONS?

■

ACKNOWLEDGEMENTS AND REFERENCES

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