Identifying the Right Team for a Successful QI Applied Learning Project

Developed from **Q-TIPS** Principal Investigators Lynne Sinclair and Ross Baker

Q-TIPS = Quality Improvement Teamwork Interprofessional Performance Success tips for teams (Q-TIPS)

Context: Creating effective interprofessional improvement teams that work well together has been identified as a critical factor to success in quality improvement. Communication, role clarity and teamwork need to be considered at all phases of QI project development and implementation.

Recommendation: That evidence based team concepts and tools be integrated in the IDEAS Advanced Learning Program team identification process to maximize success

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Key Steps to Consider for Effective Team Identification

1.) Did you use key processes of your improvement opportunity to help you determine representation of team members in the QI Project? (Nembhard, 2015)

- Ensure that membership in your project includes all stakeholders most impacted by your project at different levels including key representation of the processes to be improved.

- Ensure that Staff who are closest to the patients/clients (i.e. point of care) are included or have representation in QI Projects. Often this representation can be overlooked as team members.

2.) Have key roles of the QI Project Team been identified and assigned?

QI Project team members often contain a range of roles at various phases of the project and the roles will depend on the stage of your project, and the resources available for the team.

- **Executive Sponsor:** The Executive Sponsor is a senior leader in your organization, usually at the vice president (or equivalent) level. This person manages/has authority over key resources and processes in your organization that may be necessary for your project. Each project team must have an Executive Sponsor. In the case of projects that cross several organizations, you must have an Executive Sponsor from each organization. Their sign-off indicates that the organization is committed to the successful implementation of your project. IDEAS provides a tailored learning program for all Executive Sponsors, which includes a webinar and one-day workshop.

- **Direct Supervisor(s):** The Direct Supervisor is the person directly responsible for the work time of participating team members. They must sign off to indicate your organization is committed to your participation in the program and to providing you with the time you will need to successfully implement your project.

- **Team Lead:** Accountable for leadership of the project team and coordinates day-to-day project progress. *The Team Lead is included as one of the team members that will attend the IDEAS Advanced Learning Program.*

- **Process Owner:** Often the unit manager or person in a management position accountable for the process being improved; this person often acts in the position of Team Lead.

- **Clinical Champion:** Individual has a key role to play in the process to be improved, the organization or partnership and is seen as a clinical champion or person of influence within their practice or organization. *The Clinical Champion is included as one of team members that will attend the IDEAS Advanced Learning Program.*

- **Frontline Staff:** The involvement of front line staff is critical to a team's success as they possess first-hand knowledge of the current state and can be a great source of new ideas to test. As well, there involvement early on can help influence other colleagues to understand the benefits of testing new change ideas. We define front line staff as people who directly provide care to patients/clients/residents in the process and system being improved. These are ideally interdisciplinary, cross sectoral teams. *The frontline staff are included as those that will attend the IDEAS Advanced Learning Program.*

- **Patients/Caregivers/Family:** The patient experience/narratives will help greatly to inform QI opportunities. *Included as one of the members that will attend the IDEAS Advanced Learning Program, or, can be used on the larger supporting team.*

- **Quality Improvement Advisor:** Someone who does not necessarily have content expertise, but provides and builds QI expertise in the team. IDEAS provides each team with a Health Quality Ontario Quality Improvement Advisor. The Advisor will coach and guide the team through their applied learning project. *The Improvement Advisor does not count towards the team.*

Readiness Assessment Checklist for Identifying Potential Applicants for IDEAS

Readiness for Participation Defined – This readiness assessment measures if an individual/team or their related organization have the knowledge, skills, resources and support required to successfully engage in the requirements of the IDEAS Advanced Learning Program (ALP). This checklist is not meant to be an exhaustive list; rather it focuses on the key determinants of success based on the first three years of offering the IDEAS ALP. Use this checklist to help assess your people/teams for readiness. The greater the number of criteria met, the more likely an individual/team is ready for the ALP.

List of individual factors to consider:

1. Individual's motivation for participating in the IDEAS ALP is to improve a process benefitting patients, staff and/or providers.
2. Individual has a strong desire to build QI capacity and commits to applying their QI knowledge to other projects upon graduation.
3. Individual has time protected to work on the project associated with their enrollment in the ALP (approximately 5-10 hours per week) and their organization's overall support for attending the ALP (e.g. senior managers or clinical leaders wearing multiple titles in multiple settings may not have the time to dedicate to leading or conducting tests of change).
4. Individual does not have a planned absence (including retirement) from work that would occur within 6 months of graduating from the IDEAS ALP.
5. Individual has a key role to play in the process to be improved, the organization or partnership (e.g. they work on the front lines of the process to be improved in a clinical or administrative role, they are the process owner, or they are seen as a clinical champion or person of influence within their practice or organization).
6. Individual is open to trying new things and is receptive to new ways of learning and new ways of relating to patients, caregivers, staff and providers.
7. Individual understands the importance of establishing and maintaining collaborative relationships with fellow employees and providers within their own setting but also between settings/organizations.
8. Individual has experience using data to monitor performance and to influence decisions around process changes based on analysis of current baseline data.
9. Individual is open to external coaching support and is willing to receive constructive feedback and suggestions.
10. The sponsoring organization(s) is (are) able to make the suggested changes to the process being improved as required during the period of the program and this does not conflict with other planned initiatives in the organization (e.g. there are no other major priorities taking place like a renovation, a new EMR, a move into a new building, etc.).

List of team factors to consider:

a) Team has representatives from all key functions or organizations and are committed to the overall goal that they were created to pursue.
b) Team members have a clear understanding of what they are to accomplish and how success will be measured.

c) Team has a respected leader who is invested in pursuing the overall goal.
d) Team has an agreed upon structure for group norms and has shown some success operating within those norms (e.g. role clarity, how decisions are made, how conflict is handled, how communication takes place, etc.).
e) Team's purpose is clearly aligned to a health system strategy and/or overall governance structure

When you've identified the Team

The IDEAS Application can be found online at: http://application.ideasontario.ca/

If teams have any trouble with the application, contact ideas@utoronto.ca