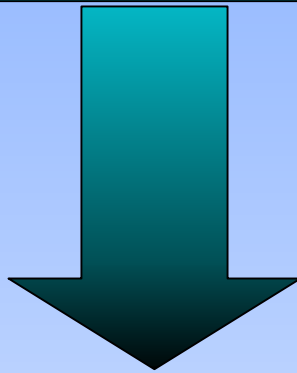


# III. How to Make a Team Process Work



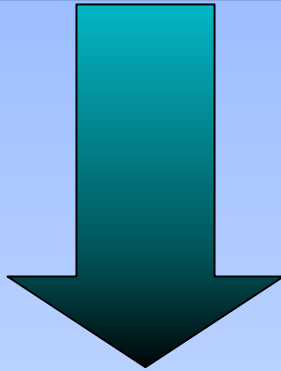
# Clarify Goals



- Discuss mission



# Educate and Build the Team



- Build the team
- Set ground rules and logistics
- Educate team members about process improvement and team goals







# ***Clarify Purpose***

## **Clarify meeting purpose and outcome**

- Identify meeting participants
- Select methods to meet purpose
- Develop and distribute agenda
- Bring necessary supplies to the meeting
- Identify meeting times



# ***Review Roles***

## **Set or review ground rules**

- Identify roles:
  - Recorder
  - Timekeeper



# ***Review Agenda***

## **Develop and distribute a timed agenda**

- Amend agenda as necessary per team's recommendations



# ***Work Through Agenda Items***

- **Cover one item at a time**
- **Manage discussions and maintain focus and pace**
  - Solicit team participation
  - Clarify ambiguous points
  - Resolve any conflicts



# ***Review Record***

- Summarize decisions
- Review action items
- Identify follow-up
- Summarize responsibilities of team members



# ***Plan Agenda***

- Solicit agenda items for next meeting
- Review time and place for next meeting



# ***Evaluate Meeting***

- What went well?
- What could be improved?
- Any remaining questions?



# *Team Ground Rules*

- As members
  - Attendance is expected
  - Actively participate
  - Follow through with assignments
  - Share information and seek input outside of meeting
  - Be respectful of all members and their opinions
  - Keep side conversations to a minimum



# ***Actual meetings***

- Distribute a written agenda before the meeting
  - Include a timeframe for each item (see sample agenda)
  - Plan time on agenda to explain new tools to the team
- Start every meeting on time and end every meeting on time
- Notify either leader or facilitator if unable to attend
- Develop a Parking Lot - some thoughts and ideas may need to be discussed at a future meeting
- Wrap-up and summarize the discussion
- Meet frequently, at least twice per month, to maintain progress and momentum



# Sample Agenda

## Catalyst for Kids TGIT/F Team Thursday, December 19, 2002 Agenda

### Objective(s)

1. Explore additional Asthma information to assist in focusing our improvement work
2. Review Teamwork in Action patients

### Time            Task

12:00	Meeting set up/prep <ol style="list-style-type: none"><li>1. Arrive and eat</li><li>2. Amend agenda and assign roles (Recorder, Timekeeper)</li><li>3. Announcements</li></ol>
12:10 -12:20	<ol style="list-style-type: none"><li>1. Log book review/identify problems for completion</li><li>2. Goal summary board</li></ol>
12:20 -1:00	Finalize improvement project <ol style="list-style-type: none"><li>1. Identify aim statement</li><li>2. Identify intervention</li><li>3. Identify measurements</li><li>4. Next steps</li></ol>
1:00	Plan Next Meeting Agenda
1:05	<ol style="list-style-type: none"><li>1. Assignments</li><li>2. Evaluation</li></ol>
1:15	Adjourn

### Team Ground Rules

1. Keep promises; inform team if you cannot get task done at time promised
2. Have fun!!
3. Be on time
4. Stick to time
5. Be prepared
6. Open communication between team members
7. Keep it simple
8. Everyone participate

---

### Parking Lot

Discussion of ED measurement/how to measure and sort in clinics.



# ***Meeting Minutes***

- Publish and distribute in a timely fashion to allow preparation time before the next meeting
- Use a standard form - (see sample form)
- Include date, location of meeting, time and members present
- Remind team members about discussion points, tasks to be performed, decisions made
- Evaluate meeting - what worked well, and needed improvements
- Indicate next meeting date



# Sample Minutes Form

<i>Catalyst Subcommittee:</i>
<i>Team Leader:</i>
<i>Facilitator:</i>
<i>Date of Meeting:</i>

*Team Members Present (X)*

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**General Aim of Team:**

**Overall Progress to Date:**

**Task #1:**  
**Responsible Person:**  
**Target Date:**

**Task #2:**  
**Responsible Person:**  
**Target Date:**

**Task #3:**  
**Responsible Person:**  
**Target Date:**

**Task #4:**  
**Responsible Person:**  
**Target Date:**

**Task #5:**  
**Responsible Person:**  
**Target Date:**



# ***Effective Discussions***

- Open the discussion
- Listen
- Ask for clarification
- Manage participation
- Summarize
- Manage time (may need to adjust allotted time for agenda items)
- Contain digressions
- Test for agreement
- Close the discussion



# ***Effective Decision Making***

- Understand the context of the decision
- Determine who should be involved
- Decide how to decide - methods may include:
  - consensus - overall agreement
  - voting
  - assigning the decision to a subgroup



# ***Stages of Team Growth***

Forming

Storming

Norming

Performing



# ***Forming***

## ***(Stage 1)***

- **Associated Feelings:**
  - Excitement, anticipation, optimism
  - Pride in being chosen for the team
  - Initial, tentative attachment to the team
  - Suspicion, fear, and anxiety about the job ahead



# ***Forming (cont.)***

- Associated Behaviors:
  - Attempts to define the task and decide how to accomplish it
  - Determine acceptable team behavior
  - Decisions on what information is needed
  - Abstract discussions of concepts and issues
  - Difficulty in identifying relevant problems
  - Complaints about the organization and barriers to the task



# *Forming (cont.)*

- Tips:
  - Help team members get to know each other
  - Provide clear direction and purpose
  - Involve members in developing plans, clarifying roles, and establishing ways of working together
  - Provide the information the team needs to get started



# ***Storming***

## ***(Stage 2)***

- Associated Feelings:
  - Resistance to tasks and methods of work different from what each individual member is comfortable using
  - Sharp fluctuations in attitude about the team's chance of success



# ***Storming (cont.)***

- Associated Behaviors:
  - Arguing among members
  - Defensiveness and competition
  - Questioning the wisdom of those who selected this project and appointed the other members of the team
  - Establishing unrealistic goals (concern about excessive work)
  - Creation of a perceived “pecking order”, disunity, tension, and jealousy



# ***Storming (cont.)***

- Tips:
  - Resolve issues of power and authority
  - Develop and implement agreements about how decisions are made and who makes them
  - Adapt the leadership role to allow the team to become more independent



# ***Norming***

## ***(Stage 3)***

- **Associated Feelings:**
  - Sense of team cohesion
  - Acceptance of membership in the team
  - Relief that it seems everything is going to work out



# ***Norming (cont.)***

- Associated Behaviors:
  - Attempt to achieve harmony by avoiding conflict
  - More friendliness, confiding in each other, and sharing of personal problems
  - New ability to express criticism constructively
  - Establishing and maintaining team ground rules and boundaries (the”norms”)



# ***Norming (cont.)***

- Tips:
  - Fully utilize team members' skills, knowledge, and experience
  - Encourage and acknowledge members' respect for each other
  - Encourage members to work collectively



# *Performing*

## *(Stage 4)*

- Associated Feelings:
  - Insights into personal and group processes
  - Better understanding of each other's strengths and weaknesses
  - Satisfaction at the team's progress
  - Close attachment to the team



# *Performing (cont.)*

- Associated Behaviors:
  - Constructive self-change
  - Ability to prevent or work through group problems



# *Performing (cont.)*

- Tips:
  - Update the team's methods and procedures to support coordination
  - Help the team understand how to manage change
  - Advocate for the team with other groups and individuals
  - Monitor work progress and celebrate achievements

