Selecting Quality Improvement Team Members

Heather Reffett, District of Columbia Department of Health
Margie Beaudry, Public Health Foundation (PHF)

Performance Improvement Managers Network Webinar
June 26, 2014
888-455-7230; passcode: PERFORMANCE
PHF Mission:
We improve the public’s health by strengthening the quality and performance of public health practice

www.phf.org

Healthy Practices

Healthy People

Healthy Places
Public Health Foundation
Strengthening the Quality and Performance of Public Health Practice

**Technical Assistance & Training**
Performance management, quality improvement, and workforce development services
- Customized onsite workshops and retreats
- Strategic planning, change facilitation, accreditation preparation
- Tools, case stories, articles, and papers

[www.phf.org/qiservices](http://www.phf.org/qiservices)
[http://www.phf.org/resourcetools](http://www.phf.org/resourcetools)

**Learning Resource Center**
Where public health, health care, and allied health professionals find high quality training materials at an affordable price
- Comprehensive selection of publications
- Many consumer-oriented health education publications
- Stories and webinars on using the Guide to Community Preventive Services

[www.phf.org/communityguide](http://www.phf.org/communityguide)

**Learning Management Network**
The nation’s premier learning management network for professionals helping to protect the public’s health – over 760,000 registered learners and 29,000 courses

[www.train.org](http://www.train.org)

**Academic Practice Linkages**
Furthering academic/practice collaboration to assure a well-trained, competent workforce and a strong, evidence-based public health infrastructure
- Council on Linkages Between Academia and Public Health Practice
- Core Competencies for Public Health Professionals
- Academic Health Department Learning Community

[www.phf.org/councilonlinkages](http://www.phf.org/councilonlinkages)
[www.phf.org/corecompetencies](http://www.phf.org/corecompetencies)

[www.phf.org](http://www.phf.org)
Objectives

- Identify points of vulnerability in team construction and potential impact on team performance
- Review Washington D.C.’s experience and how it influenced development of this tool
- Introduce a tool to support selection of quality improvement (QI) teams
Background

- **QI Training:** Most Common Technical Assistance Request PHF Receives
- **Constructing Teams:** Most Common Question in Planning a QI Training Event
- **Team Effectiveness:** A Common Reason QI Projects Stall or Fail
What Makes QI Teams Work?

- Positive disposition toward making an improvement
- Skills and knowledge related to the problem
- Ability to work effectively as part of a team

Getting to the Performing Stage

- Forming
- Storming
- Norming
- Performing
Getting to the “Performing” Stage

Based on Bruce Tuckman’s stages of group development.
http://psycnet.apa.org/journals/bul/63/6/384/
Washington D.C.’s Experience

- DC Department of Health
  - 621 FTEs
  - $265 M
  - State and Local functions

- Spring of 2012 began three QI projects
  - PHF: Harry Lenderman
  - Restaurant Inspections
  - Grants Management
  - QI Culture
Washington D.C.’s Experience

- Assigned Team Roles
  - Co-leaders
  - Timekeeper
  - Note taker
  - Scribe “Vanna White”

- Initial Assessment - Stakeholder Analysis

![Stakeholder Analysis Diagram]

- Low Interest
  - Keep Satisfied
  - Monitor (minimum effort)
- High Interest
  - Engage Closely and Influence Actively
  - Keep Informed

- High Power
- Low Power
Washington D.C.’s Experience

- This takes forever………..
- Stages of Team Development
- Everyone rated performance
  - Workgroup performance
  - Team performance
  - Individual performance

“The commitment of the workgroup to common objectives/goals”.

“Your team has effective processes for making decisions, communication and assigning work”.

“Your contribution to the success of the QI project”.
Washington D.C.’s Experience

➢ “Be the change that you wish to see in the world” – Mahatma Gandhi

➢ Actual: “If we could change ourselves, the tendencies in the world would also change. As a man changes his own nature, so does the attitude of the world change towards him. … We need not wait to see what others do.”

➢ Culture change requires individuals

➢ Flushed out list with Harry
  ➢ Now teach QI principles and ‘attitude’
    ➢ Introduction to QI
    ➢ Personal SWOT
    ➢ QI Trainers – “How to Facilitate”
Team Member Selection Tool

- Collaboration between DC and PHF
- 34 characteristics
- 8 categories
  - Knowledge of the problem (4)
  - Effective team player (4)
  - Reliability (2)
  - Effective communication (4)
  - Flexibility (3)
  - Effective problem solving (8)
  - Enfranchises and engages others (5)
  - Practices continuous improvement (4)
- Accompanying Excel “score sheet” (matrix)
Accessing the Tool

www.phf.org/resourcetools/Pages/Team_Member_Selection_Tool.aspx

Team Member Selection Tool

Related Categories: Performance Management, Quality Improvement

Overview
The success of any quality improvement (QI) endeavor depends on the team working on it. It is not the number of people, but rather how well they function and work together, that makes a team successful. QI team members must respect each other, and share common goals, vision, agendas, and timelines to be successful. QI teams work best when each team member has a good disposition toward making the improvement. A person’s disposition is defined as inherent qualities of mind and characteristics or an attitude and mood which is demonstrated often through their behaviors, or a tendency to act in a specified way. Some dispositions are better suited to effectively pursuing QI in teams.

Selecting Quality Improvement Team Members, created by Heather Reffett of the District of Columbia Department of Health and Public Health Foundation team members Harry Lenderman, Jack Moran, and Margie Beaudry, provides a common sense approach to constructing a QI team that is likely to succeed. Use this tool and the accompanying Team Member Selection Matrix to rate QI team candidates on 34 characteristics. The ratings can be based on observations from other teams or projects they have worked on, even if they were not QI projects.
## Tool Snapshot

### Team Member Skills, Knowledge, and Dispositions

<table>
<thead>
<tr>
<th>Knowledge of the problem</th>
<th>Potential Team Member 1</th>
<th>Potential Team Member 2</th>
<th>Potential Team Member 3</th>
<th>Potential Team Member 4</th>
<th>Potential Team Member 5</th>
<th>Potential Team Member 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Brings to the table some direct experience with one or more aspects of the problem</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>2. Understands the context in which the problem persists</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>3. Engages in multi-dimensional thinking that embraces diverse perspective of organizational leaders, customers, politicians, labor unions, middle management, etc.</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>4. Understands the consequences of failing to solve the problem</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Effective team player</th>
<th>Potential Team Member 1</th>
<th>Potential Team Member 2</th>
<th>Potential Team Member 3</th>
<th>Potential Team Member 4</th>
<th>Potential Team Member 5</th>
<th>Potential Team Member 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Fits in and flows with the team dynamics</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>6. Committed to the team and the problem at hand</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>7. Treats others respectfully and supportively</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>8. Shows commitment to the team and the problem to be solved</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reliability</th>
<th>Potential Team Member 1</th>
<th>Potential Team Member 2</th>
<th>Potential Team Member 3</th>
<th>Potential Team Member 4</th>
<th>Potential Team Member 5</th>
<th>Potential Team Member 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>9. Documents discussions and team meetings in order to monitor and reflect on progress</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Potential Team Member 1</th>
<th>Potential Team Member 2</th>
<th>Potential Team Member 3</th>
<th>Potential Team Member 4</th>
<th>Potential Team Member 5</th>
<th>Potential Team Member 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Scores</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>21</td>
<td>11</td>
<td>22</td>
<td>30</td>
<td>19</td>
</tr>
<tr>
<td>Selected? (Yes/No)</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Cautions and Limitations of Use

- A starting place
- A tool *for considering* candidates for QI teams
- A tool to help find the right configuration of people

- *Not* a screening test
- *Not* tested for predictive validity (yet)
- *Not* the last word on who is best to do QI work
All Teams Not Created Equal

Learning Teams

“little qi”: projects of short duration targeting a specific program element or process improvement. For example:

- Reducing clinic wait times
- Improving restaurant inspection rate
- Increasing infant immunization rate

Some characteristics evolve with exposure to QI; others may be more “trait” based.

The project provides a concrete focus for learning and applying QI tools and methods – get started doing QI.

All team members need not possess all characteristics; however each characteristic should be represented somewhere on the team.
All Teams Not Created Equal

 Enterprise-wide Teams

- Projects that have high visibility and consequence for the entire organization. For example:
  - Improving staff satisfaction scores
  - Reducing travel pre-approval times
- The project impacts nearly everyone in the organization
- The consequences of failure are significant
- All team members should possess all characteristics based on their performance on other teams (QI or otherwise)
Public Health Foundation

www.phf.org

Margie Beaudry
Senior Associate, Performance Improvement Services
mbeaudry@phf.org
202.218.4415

Heather Reffett
Performance Improvement Manager
DC DOH
heather.reffett@dc.gov
202.442.9186
Discussion/Q&A

All lines are open and live!

Please remember to use your mute button or *6
Thank you!
Please send comments and questions to pimnetwork@cdc.gov

For more information please contact CDC’s Office for State, Tribal, Local and Territorial Support.

This presentation was supported by funds made available from the Centers for Disease Control and Prevention, Office for State, Tribal, Local and Territorial Support, under Grant No. 5U58CD001342-03.

The findings and conclusions in this presentation are those of the authors and do not necessarily represent the official position of the Centers for Disease Control and Prevention.