TEAMWORK IN HEALTH CARE QUALITY IMPROVEMENT:
EXECUTING SUCCESSFUL TEAM MEETINGS

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Disclosure Slide

Steven Kaplan has no conflicts to report.

Presentation Key Focus:
What will you learn?

Identify and engage appropriate disciplines to become part of your team

Learn about processes to ensure effective team meetings

- Planning
- Running Meetings
- Follow-up After Meetings

Overcome obstacles in team interactions

Setting the Stage: Open Discussion

Think about a recent team meeting you attended.

What contributed to the meeting being effective?

What contributed to the meeting being ineffective?

Were there some people who always talked? Were there others who never spoke?

How did the group make decisions?

Did the team members seem to think that their opinions/contributions mattered?

"The leaders who work most effectively, it seems to me, never say 'I.' And that's not because they have trained themselves not to say 'I.' They don't think 'I.' They think 'we'; they think 'team.' They understand their job to be to make the team function. They accept responsibility and don't sidestep it, but 'we' gets the credit. This is what creates trust, what enables you to get the task done."

– Peter F. Drucker (1909-2005)

Tips for Leading Effective Meetings

Effective meetings need to have:

- Good structures
- Good processes
- Good leadership
- Good facilitation

But how?

Planning: Prepare for Team Meetings

Identify appropriate team members/disciplines

- Have you worked with staff/clinicians previously?
- Were the interactions effective?
- Are they interested in the issue you are focusing on?

Communicate with several team members before meeting

- Prepare them about meeting goals and what you hope to accomplish
- Ensure they know what you intend to cover and expectations/their role at the meeting

Meet with leadership to help engage various team members

Planning (continued)

Send meeting materials in advance so team is prepared
- Have copies of materials available at meeting

Email meeting reminder 1-2 days prior to meeting

Create a meeting schedule, using your project timeline
- Ensure key participants are able to attend prior to confirming first meeting
- Provide team members with enough advance notice!

Running Meeting

Start with introductions

Team leader to tell meeting goals

Identify various people in group to assist with meeting; volunteers for:

- Note-taker
- Time-keeper
- Engaging in the team's work/follow-up

Engage in brainstorming; "no idea is a bad idea"

- Identify 2-3 top issues to focus on

Make sure you stay on track

Before the Meeting Ends…

Outline next steps and "owners" of various follow-up points

Discuss team membership – have all the key people been included

Articulate what is due before next meeting

Address questions about next steps and assignments

Communicate future meeting dates

Ensure team members are able to attend future meetings

After the Meeting: Follow-up

Send immediate follow-up email with brief meeting summary and list of next steps (within 1-2 days)

Remind team of meeting schedule and next meeting

Ensure leadership is included on communication

- Keep them updated about project

Check in with team members on progress of next steps/assignments

- Offer advice to those running into roadblocks
- Seek leadership's advice on important issues beyond your control

Have follow-up materials/data available before next meeting so team can review content

Take the opportunity to have short "huddles" with team members, if available

Overcoming Challenges in Team Meetings

Challenge	Ways to Overcome Challenge
Disagreement about meeting goals	Pre-conversations with various team members prior to meeting to obtain buy-in
Obtaining leadership support	Identify QI topic aligning with what leadership will support (e.g., cost reduction or a regulatory issue)
Disagreements about data	Present data in tactful ways (e.g., share provider-specific, sensitive data **blinded**) Share data in advance of meeting to individual team members to avoid tangents/potential meeting derailment
Research versus Quality	Work with team to understand difference between research and quality; try to align research goals with quality (more on this topic later in CQFP)

Overcoming Challenges in Team Meetings (continued)

Challenge	Ways to Overcome Challenge
Team members going off on tangents and not addressing meeting goals	Create a "parking lot" for issues that don't relate to meeting goals and that can't be resolved/addressed at meeting
Team members with goals/issues too large in scope	Use "parking lot" for issues that are too large in scope also; be sure to develop manageable Aim statements/goals
Confusion over who is responsible for what	Assign roles; articulate next steps in writing; follow-up with team to ensure next steps are being addressed
Large, unmanageable team, leading to lack of production	Keep core team at a manageable size (e.g., 10 people); ensure clear roles and responsibilities are defined
Lack of contribution from team member(s)	Pay attention to team composition and make sure the right people are involved; create atmosphere of accountability where everyone feels valued and encouraged to contribute

Resources

Association of American Medical Colleges (AAMC), *Leadership Lesson: Tools for Effective Team Meetings*:
https://www.aamc.org/members/gfa/faculty_vitae/148582/team_meetings.html#.Usy_D_RDucw

Katzenbach, J. and Smith, D. (2005). The Discipline of Teams. *Harvard Business Review:*
http://hbr.org/2005/07/the-discipline-of-teams/ar/1   (link contains executive summary to full article)

Institute for Healthcare Improvement. (2011). *Science of Improvement: Forming the Team*:
http://www.ihi.org/knowledge/Pages/HowtoImprove/ScienceofImprovementFormingtheTeam.aspx

Institute for Healthcare Improvement. (2011). *Use Regular Huddles and Staff Meetings to Plan Production and Optimize Team Communication:*
http://www.ihi.org/knowledge/Pages/Changes/UseRegularHuddlesandStaffMeetingstoPlanProductionandtoOptimizeTeamCommunication.aspx

THANK YOU

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