

Team Roles

Participant training objectives:

- To understand the roles and responsibilities of project team members
- To consider how to fulfill a particular team role in a future improvement project

Target audience:

Quality improvement committee members, QI project team members, and other staff involved in quality improvement project teams

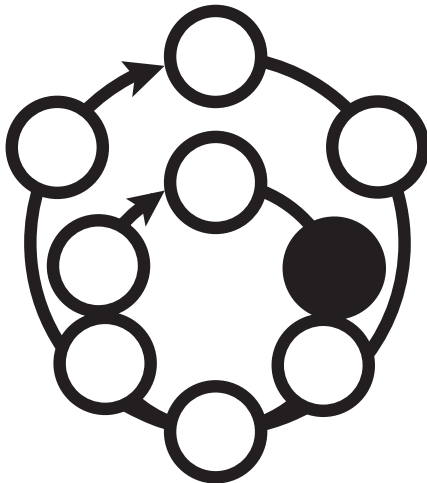
Type of exercise:

Quiz; individual and group exercise, 60 minutes

Key concepts:

Quality improvement teams consist of the following key roles:

- Team leader
- Team facilitator
- Team member
- Timekeeper
- Recorder



The Big Picture:

Role definition is important to a quality improvement team for the same reason it is important to an athletic team: if certain members are not designated to complete key tasks, they may not be completed at all. In the HIVQUAL model, team roles are defined during Step 2 of the project cycle: Develop a project team workplan.

SESSION AT-A-GLANCE	WHO	HOW LONG
1. Welcome, Learning Objectives, Agenda	Facilitator	5 minutes
2. QI Background: Team Roles	Facilitator	10 minutes
3. Group Exercise: Quiz	Participants	30 minutes
4. Learning Transfer: Worksheet	Participants	10 minutes
5. Wrap-up	All	5 minutes
		60 minutes

Materials

For this group learning session, you will need the following materials:

- Participant handouts:
 - Quiz
 - Learning Transfer Worksheet
 - Copy of slide presentation
- Overhead projector/LCD panel (optional)
- Wipeboard/chalkboard (optional)

Photocopy the Quiz, Learning Transfer Worksheet, and slide presentation for each participant.

Prepare your presentation slides for display:

- Photocopy the slides, or write the slide content on transparencies or on flipchart paper.
- For display using an LCD panel, enter the content into a computer file.

Preparation

To prepare for the group learning session, complete the following tasks:

Familiarize yourself with the session's structure and content:

- Read through the Group Exercise notes in their entirety, including the exercise answer key, presentation slides, and participant handouts.
- Practice the presentation outlined in the Group Exercise notes.

Prepare the training room.

- Arrange the tables and chairs in a circle or square shape, if possible.
- Set up and test equipment (e.g. overhead projector), if applicable.
- Make sure you have enough chalk or wipeboard markers, if applicable.

Notes

Team Roles: Group Exercise

Welcome and Introductions

To begin the group learning session, welcome participants and thank them for their participation. If necessary, ask individuals to introduce themselves to the group.

Explain that certain team roles, including team leader and team members, are assigned by the HIV quality program that charges the team with its purpose. Additional roles can be appointed at initial or future team meetings.

Learning Objectives

Tell participants that by the end of the session they will:

- Understand the roles and responsibilities of project team members
- Have considered how to fulfill one team role in a future improvement project

Team leader. The primary responsibilities of the team leader are to:

- Lead team meetings.
- Direct team activities toward achieving the goals stated in the Improvement Project Memo
- Ensure productive use of team members' time
- Represent the team to management and the quality committee(s)

Agenda

Provide a brief description of the session's primary components:

- Presentation of team roles and responsibilities
- Group exercise on matching team roles and responsibilities
- Learning Transfer Worksheet

Team facilitator. The primary responsibilities of the team facilitator are to:

- Ensure equal participation by team members.
- Mediate and resolve conflict
- Provide feedback and support to the team leader.
- Suggest problem solving tools and techniques

Quality Improvement Background


Distribute a copy of the slides to each participant for note taking and/or future reference.

Introduce the key roles of a QI team:

- Team leader
- Team facilitator
- Team member
- Timekeeper
- Recorder

Team member. Team members include the team leader, facilitator, timekeeper, and recorder, along with other staff members selected to participate in the project. The primary responsibilities of team members are to:

- Offer perspective and ideas
- Actively participate in team meetings
- Adhere to meeting ground rules
- Complete assignments on time
- Support implementation of recommendations

 **Recorder.** The primary responsibilities of the team recorder are to:

- Take minutes of the meeting
- Distribute meeting minutes to all team members

Timekeeper. The primary responsibilities of the team timekeeper are to:

- Keep track of time during team meetings
- Help the team manage its time

Explain that timekeeping and recordkeeping responsibilities may be rotated between team members during the project cycle, assigned, or assumed by the facilitator.

Getting Started

Divide the participants into teams of roughly equal size, 4-6 people per group. You can assign participants to teams yourself or ask them to count off by a given number and form teams with other participants who have the same number.

Quiz Group Exercise

Distribute the Quiz to each participant and provide directions for completing the exercise:

- Complete the quiz individually. (10 minutes)
- Review the quiz as a team and reach consensus on each answer. (10 minutes)

Call time after the first 10-minute interval and remain available to answer questions and facilitate the process. Assist teams who have problems getting started or become stuck on a particular point.

Reporting Back

Call time after the second 10-minute interval. Read each responsibility out loud and then alternate between teams for a response. If a team's response differs from yours, ask for the members' rationale. Then provide the rationale given in the answer key, keeping in mind that the ultimate goal is to discuss team roles, not to defend any particular response.

Learning Transfer Getting Started

Distribute the Learning Transfer Worksheet and give participants 5 minutes to complete it.

Debrief

If time permits, ask participants to individually share their anticipated team roles and the related tasks.

Wrap-up

Ask participants to provide feedback on whether or not they have achieved the objectives introduced at the beginning of the group learning session:

- To understand the roles and responsibilities of project team members
- To consider how to fulfill one team role in a future improvement project

Schedule an informal follow-up session with any participant(s) who has not reached the objectives.

Team Roles: Quiz

Instructions:

Read the team responsibility and mark who is primarily accountable for its completion. More than one role may apply to a single responsibility.

TEAM RESPONSIBILITY	LEADER	FACILITATOR	RECORDER	TIMEKEEPER	MEMBER
1. Encourage everyone to contribute to decision making					
2. Maintain documents related to the team's work					
3. Offer ideas about the potential cause of a problem					
4. Conduct team meetings					
5. Be an active presence in team meetings					
6. Help feuding team members to resolve their conflict					
7. Participate according to team ground rules					
8. Keep team members working in the same direction					
9. Announce when the time allotted for a particular meeting topic is up					
10. Complete assignments by the designated deadlines					
11. Focus participants on the goals of the Improvement Project Memo					
12. Report progress to the quality committee					
13. Support project solutions outside of team meetings					
14. Write down what happens during team meetings					
15. Attend training on the latest quality tools					

Team Roles: Learning Transfer Worksheet

Instructions:

Think of one or more improvement projects in your facility which are either underway or could be underway in the future. Using the information from today's session, write down the project role you are most likely to assume and 3 tasks related to filling that role.

Project:

Team Role:

Related Tasks:

1.

2.

3.

Team Roles: Answer Key

TEAM RESPONSIBILITY	LEADER	FACILITATOR	RECORDER	TIMEKEEPER	MEMBER
1. Encourage everyone to contribute to decision making	✓	✓			
2. Maintain documents related to the team's work			✓		
3. Offer ideas about the potential cause of a problem	✓	✓	✓	✓	✓
4. Conduct team meetings	✓				
5. Be an active presence in team meetings	✓	✓	✓	✓	✓
6. Help feuding team members to resolve their conflict		✓			
7. Participate according to team ground rules	✓	✓	✓	✓	✓
8. Keep team members working in the same direction	✓				
9. Announce when the time allotted for a particular meeting topic is up				✓	
10. Complete assignments by the designated deadlines	✓	✓	✓	✓	✓
11. Focus participants on the goals of the Improvement Project Memo	✓	✓			
12. Report progress to the quality committee	✓				
13. Support project solutions outside of team meetings	✓	✓	✓	✓	✓
14. Write down what happens during team meetings			✓		
15. Attend training on the latest quality tools	✓	✓	✓	✓	✓