

Team Self Evaluation

Participant training objectives:

- To understand the importance of post-improvement project team evaluation
- To be able to use a self evaluation tool to assess team performance
- To be able to make improvement recommendations for future team projects

Target audience:

Quality improvement (QI) team and committee members involved in the HIV program's QI projects

Type of exercise:

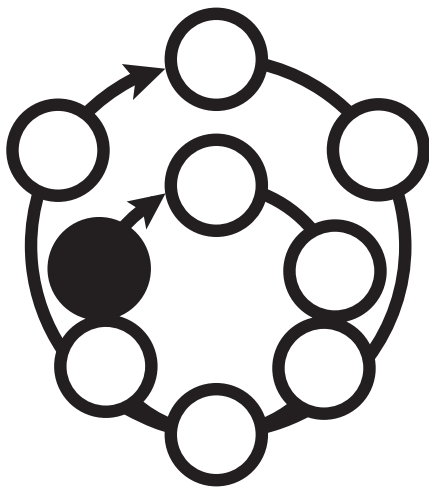
Role Play; group exercise, 60 minutes

Key concepts:

Team self evaluation and feedback are important aspects when a team concludes its improvement activity. Basic rules for feedback include:

- Recognize the need for feedback
- Use concrete examples to make your point
- Communicate your own views
- Be constructive
- Listen carefully

Note: The Brainstorming Exercise should be completed before the Team Self Evaluation Exercise.



The Big Picture:

Team members seek closure during Step 6 of the project cycle. While the primary focus of this step is to incorporate project-related changes into daily work processes, it is also an important opportunity for teams to discuss the positive aspects of their group interactions along with the areas that need improvement. In this way, team members help to build a "template" for success for future team projects.

SESSION AT-A-GLANCE	WHO	HOW LONG
1. Welcome, Learning Objectives, Agenda	Facilitator	5 minutes
2. Group Exercise: Role Play	Facilitator	10 minutes
3. QI Background: Basic Feedback Guidelines	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:
 - Example
 - Role playing note cards
 - Learning Transfer Worksheet
 - Copy of slide presentation
- Flipchart paper and markers
- Overhead projector/LCD panel (optional)
- Wipeboard/chalkboard (optional)

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.

Photocopy the Example, 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.
- Draw the evaluation grid shown in the answer key on flipchart paper, enough so that each team has one grid on which to record their responses.

Prepare the training room:

- Tape the evaluation grids to the wall for use during the exercise.
- Make sure you have enough markers for each team.
- Arrange the tables and chairs in a circle or square shape, if possible.
- Set up and test equipment (e.g. overhead projector), if applicable.
- Create the role playing note cards as described in the section that follows.

Role Playing Note Cards

Create one set of role-playing cards per team by printing out the roles below and taping them to 4 x 6 note cards (one role per card), or simply copying the information onto note cards.

If your team(s) has fewer than 5 members, begin with the 3 most essential roles (marked with an asterisk) and then complete the set with roles of your choice. A sixth person could be the recorder for the group.

***ROLE: DOCTOR/TEAM LEADER**

Job: Medical Director of HIV Clinic

Background: Was assigned to be a team leader by the CEO
Has worked at the clinic for the last 3 years
Has received HIVQUAL training on team roles

Personality: Pushy but fair; very busy; patient oriented

Key Remarks: "My schedule is extremely tight, so it was frustrating when everyone wasn't here on time for our meetings."
"It seems like I had to explain medical terms too often."
"Sometimes I couldn't attend our meetings because patients were scheduled at the same time."

***ROLE: NURSE/TEAM FACILITATOR**

Job: Nurse in HIV Program

Background: Of the team members, has worked in the clinic the longest
Knows staff and patients really well

Personality: Warm and well-respected; engaging personality; helps everybody; good relationship with patients

Key Remarks: "The ideas we generated using the flowchart were creative and fun."
"At times I felt like the group reached consensus too fast."
"I think all of the team members had a good understanding of the team goal and purpose."

***ROLE: CLERK/TEAM MEMBER**

Job:	Clerk who schedules patients
Background:	Chosen to participate for knowledge of the clinic and its processes
Personality:	Friendly; very accommodating; wants to help out
Key Remarks:	<p>"We heard many anecdotes during our meetings, but the team leader always brought us back to the big picture."</p> <p>"Sometimes I didn't say what I wanted because I felt that my opinions weren't as important as other members'."</p> <p>"Although we decided to sustain our improvements, I'm not sure who will re-measure the PPD once the group is dissolved."</p>

ROLE: ADMINISTRATOR/TEAM MEMBER

Job:	Administrator for HIV Program
Background:	<p>New to HIV Program</p> <p>Not familiar with most processes</p> <p>Was asked to participate in this team</p>
Personality:	Numbers oriented; focused on efficient use of time and resources
Key Remarks:	<p>"We used our time well. I was initially worried to commit all the resources for the process."</p> <p>"We were able to reach the goal for PPD, but we were often unclear about which resources we could commit and use to achieve the goal."</p> <p>"The meeting with staff to explain the new policy worked really well and was well-received by all participants."</p>

Team Self Evaluation: 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.

Learning Objectives

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

- Understand the importance of post-project team evaluation
- Be able to use a self evaluation tool to assess team performance
- Be able to make improvement recommendations for future project teams


Agenda

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

- Presentation of a team self evaluation tool
- Group exercise on identifying team strengths and weaknesses via role play
- Learning transfer worksheet to practice evaluating project team performance

Quality Improvement Background

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


-  Begin by explaining that the process of team self evaluation allows team members to celebrate their successes, identify challenges, and make recommendations for improving the team process in the future—thereby bringing closure to one project while creating opportunities for future improvement.

Review basic rules for providing feedback, including:

- Recognize the need for feedback
- Use concrete examples to make your point
- Communicate your own views
- Be constructive
- Listen carefully

Example

Introduce the team self evaluation tool that can be used to evaluate team performance. To complete the evaluation, team members:

-  1. **Identify the subject of the evaluation.** In this case, the subject is team performance throughout the project cycle, as measured against the improvement project memo.

2. **Set up three columns on a flipchart.** Write “What Worked” above the left column for positive feedback; “What Needed Improvement” above the middle for areas needing improvement; and “How Do You Improve” above the right column for improvement recommendations.
3. **Brainstorm positive areas and areas needing improvement.** Some items could be both positive and negative feedback, depending on the circumstances.
4. **Discuss each item in the “What Needed Improvement” column to determine if there is consensus that improvement is needed.** While all feedback is valuable, not every improvement opportunity requires immediate follow-up. Team members should discuss each item in the middle column and collectively decide how, and if, to change the team process before the next project.
5. **Make recommendations for improvement.** The recommendation should describe the action required to make the necessary improvements.

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.



Role Cards

Group Exercise

Within each group, randomly distribute one role playing card to each participant and ask that they not show their cards to one another. If there are more than 5 participants in a single group, ask the remaining member(s) to serve as team recorder.

Provide directions for completing the exercise:

- For the duration of the exercise, you are members of a PPD quality improvement team that has just finished a team cycle and successfully improved the PPD rate. Take 2 minutes to review your assigned role.
- For the next 10-15 minutes, you will discuss what went well during the process to improve PPD—and what needs improvement—using the Key Remarks section on your note card as a loose “script.”
- During your discussion, one person should record remarks on the flipchart, using the 3-column format presented in the example.
- For the last 5 minutes, you will discuss recommendations for how to improve areas of difficulty.
- Remind participants that this is a role play and that they should “play” their assigned roles and have fun.

Begin the role playing portion of the exercise by temporarily assuming the role of hospital CEO. Read the following information to kick off the team discussions:

“As the CEO of the hospital, I am very proud to thank the team and each member for their successful work in improving the PPD rate to 91%. With the help of the HIV Program, we formed a team 3 months ago with the charge of improving the PPD rate for our HIV+ population. And you have succeeded. Thanks.

Today, you will meet for the very last time to think about the team process and to let us know what we can improve for the future team project. I will ask the team leader to continue the group effort by using the team self evaluation tool. Thanks again.”

Ask the teams to begin the role play and remain available to answer questions and facilitate the process. Assist teams who have problems getting started or become stuck on a particular point.

Alert participants when 5 minutes remain so that they are adequately prepared to report back.

Reporting Back

Call time and ask one representative from each team to summarize the group’s feedback and recommendations for improvement. At the end, add any points from the answer key that the teams have not addressed.

Learning Transfer Getting Started

Distribute the worksheet and give participants 5 minutes to complete it.

Debrief

If time permits, ask participants to individually share one area that requires improvement along with the improvement recommendation.

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 importance of post-project team evaluation
- To be able to use a self evaluation tool to assess team performance
- To be able to make improvement recommendations for future project teams

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

Team Self Evaluation: Example

Self Evaluation Tool

WHAT WORKED	WHAT NEEDED IMPROVEMENT	HOW DO YOU IMPROVE
Positive feedback about the team process	Areas that posed a challenge to the team process	Recommendations for improvement

Team Self Evaluation: Learning Transfer Worksheet

Instructions:

Assess your HIV program's team performance in a recently completed quality improvement project. Using the information from today's session, complete the grid below.

WHAT WORKED	WHAT NEEDED IMPROVEMENT	HOW DO YOU IMPROVE

Team Self Evaluation: Answer Key

The sample response does not reflect how the facility necessarily should or would complete the grid, but rather one way the grid could be completed.

WHAT WORKED	WHAT NEEDED IMPROVEMENT	HOW DO YOU IMPROVE
Positive flowcharting experience	Tardiness for team meetings	Establish expectations for meeting promptness in improvement project memo
Shared understanding of team goal and purpose	Varying knowledge of medical terminology	Compile and distribute glossary of medical terms before the first team meeting
Strong leadership during team discussions	Scheduling conflicts between team meetings and appointments	Provide team meeting schedule to team as early as possible
Good use of time	Inadequate time spent reaching consensus	Train team facilitator on consensus building techniques
	Hesitancy to openly share opinions	Include encouragement for—and expectation of—open discussion in improvement project memo
	Unclear follow-up plan for PPD re-measurement and accountability	“Huddle” at the end of the meeting to create and assign follow-up tasks, particularly re-measurement
	Unclear authority to commit and use clinic resources to achieve goals	Ask the HIV quality committee to more clearly define resource allocation in the annual workplan