

# Quality Improvement Learning Collaborative

## **Session 3: Teams and Communication**

Nicole Gackstetter, CPPM, BA

Janelle Shearer, RN, MA, CPHQ

February 5, 2025



# Stratis Health

Stratis Health is a nonprofit organization that leads collaboration and innovation in health care quality and safety and serves as a trusted expert in facilitating improvement for people and communities.

The organization has a long history of working with rural providers, Critical Access Hospitals (CAH), and the Flex Program.

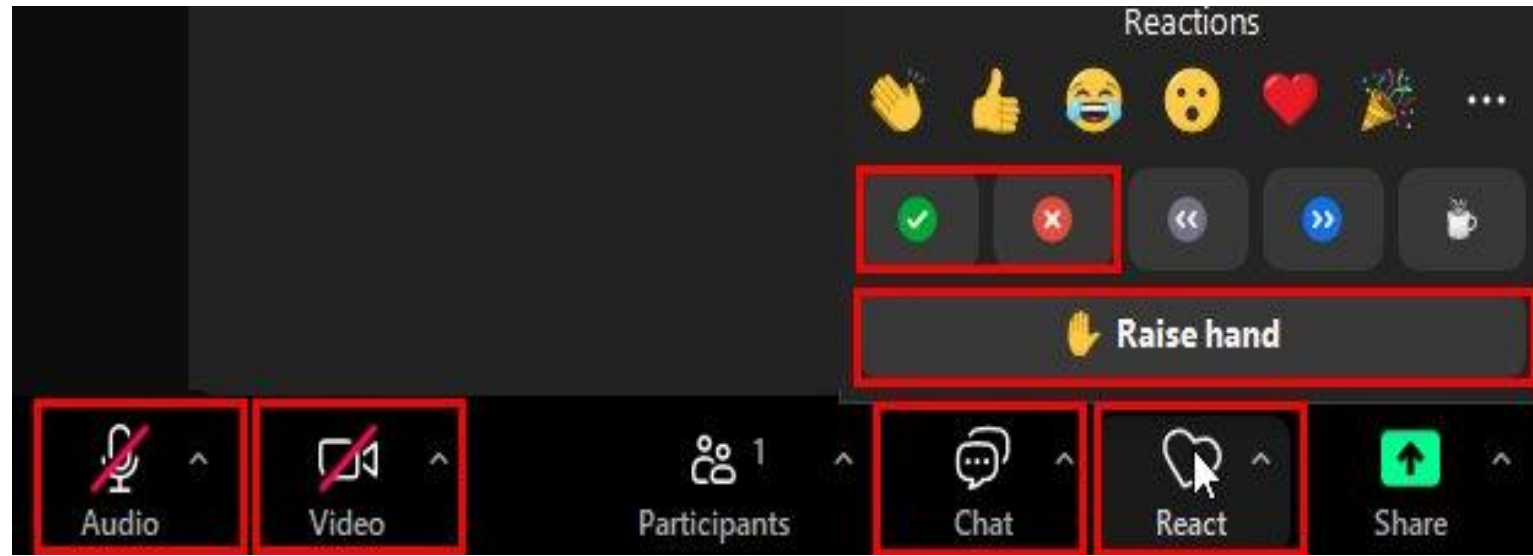


# Chat Introductions and Check In

- Name | Title/Role
- Organization
- Favorite type of ice cream?



# Housekeeping



- Video On requested
- Use the chat
- Raise your hand
- Unmute and talk
- Complete polls
- Participate in breakout groups

# Timeline and Content

Sessions will be held every other Wednesday from 1– 2 p.m. MT on the following dates:



# Learning Collaborative Objectives:

- Apply systems thinking and support quality improvement through organizational culture.
- Plan and manage quality improvement projects.
- Select and practice quality improvement methods and tools.
- Collect, analyze, and illustrate data for quality improvement.



## Session 2 Reflection

- Review the Model for Improvement framework:
  - Think about the way you formulate your project goals.
  - Talk with your team about how to incorporate **Inclusion** and **Equity** in your aim statement.
- Try a tool:
  - Identify a project you can use: A Cause & Effect Diagram, Process Map, PDSA worksheet, or 5 whys to help you assess the issues.
- Create a data plan:
  - Identify if your current projects have a data plan.
  - Draft a data plan for a current or future project.

# Session 3 Overview



# Session 3 Learning Objectives:

- Explain why a team approach is crucial for successful QI initiatives.
- Describe how a project charter can be used as a tool to support leadership of a QI team.
- Practice key communication techniques and strategies that support effective teamwork.

# Session 3 Pre-Work



## Review Modules

- [Building Your QI Team](#)  
(13-minute video)
- [Communication Basics](#)  
(11-minute video)
- [Meeting Facilitation](#)  
(8-minute video)



## Review Tools and Resources

- [Project Charter](#)
- [Work Plan](#)
- [Communication Plan](#)

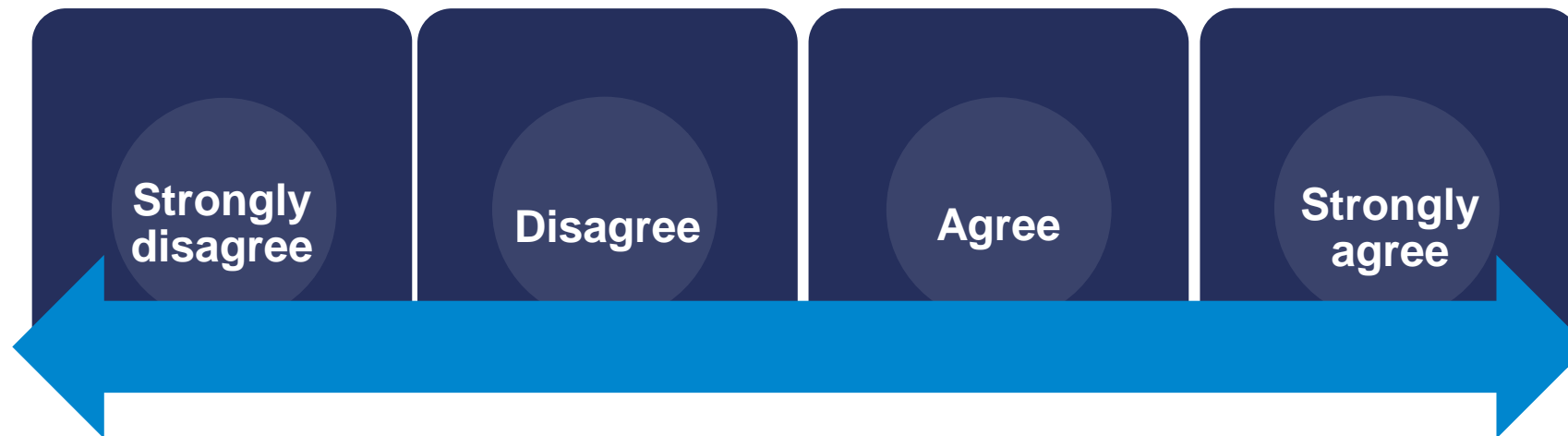
Modules and Resources Available Here:  
[Quality Improvement Basics - Stratis Health](#)



# Pre-Knowledge Gain Poll

Rate the following statement:

I understand the principles and benefits of a team-based approach to QI and can communicate and collaborate effectively with internal and external team members.



# Teams

# QI Is a Team Process

A team approach is needed when:

- The process or system is complex
- You are dealing with a recurring problem that you've tried to resolve in the past without success
- No one person in an organization knows all the dimensions of an issue
- The process involves more than one discipline or work area
- Solutions require creativity
- Staff commitment and buy-in are needed



# Independent Reflection

- Take one minute to think about teams of which you've been a part.
- What are key characteristics of high performing teams?
- Jot down your list on a piece of paper or in a note.

# Water Fall Chat

- Review your list and star your top two answers.
- Draft your response in chat but **DO NOT HIT ENTER** until we tell you to.



# High-Performing Teams

Teams that perform well:

- Have a clear and shared vision (a shared “mental model”)
- Have a clear direction and aim
- Have strong team leadership
- Have clear roles and responsibilities
- Communicate with each other, sharing feedback regularly
- Develop a strong sense of collective trust and confidence
- Create and implement ways to work together collaboratively
- Identify monitor and measure performance outcomes



# Discussion



- Now think about teams or projects that you've been on that didn't go so well.
- What are key factors or conditions that contributed to the team or project that didn't go well or failed?

# Why do QI projects fail?

- Objective not clear
- Lack of leadership support
- Lack of clear roles and responsibilities
- Scope creep
- Doesn't add value to the organization
- Not enough resources
- Poor communications
- Partners not on board
- Barriers not anticipated or managed
- Lack of project management, project plan, and monitoring and controlling

# Team Leader Roles: Building a QI Team

- Convene and organize the team
- Articulate goals clearly
- Effective meeting facilitation
- Right people
- Empower members to speak up and share
- Focus on the use of data to help guide decision making
- Enable decisions through collective input of members
- Actively promote and facilitate good teamwork
- Skillfully work with the team to resolve conflict
- Secure senior leader support

# Team Member Roles: Building a QI Team

Each team member should:

- Review and understand the specific QI Project Charter
- Understand their QI team roles and responsibilities
- Provide useful ideas, information, and respectful feedback
- Participate in team decision-making
- Assist and enable their fellow team members in carrying out the work of the QI team
- Contribute to conflict resolution
- Reduce stress on the team by focusing on systems and processes - considering the needs of the team first

# Tools To Support Effective Teams

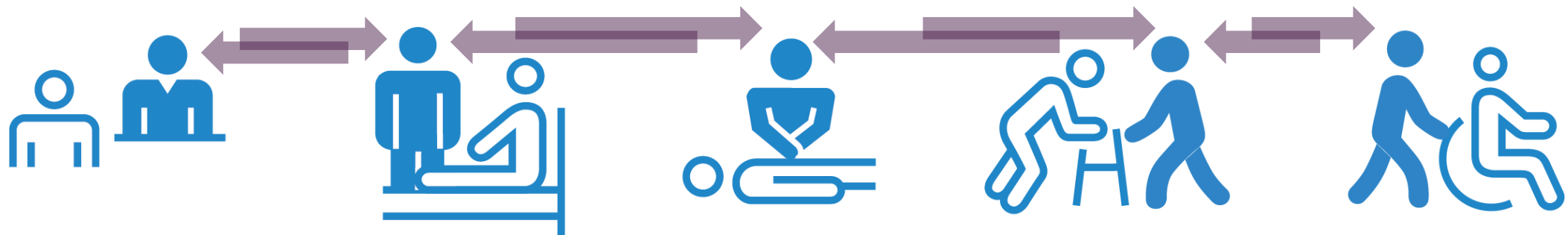
- Shared Mental Model
- Project Charter
- Project Work Plan

# Achieving a Shared Mental Model

The perception of, understanding of, or knowledge about a situation or process that is shared among team members through communication.

# How Shared Mental Models Help Teams

- Keeps the team on the same page
- Synchronizes work
- Articulates the goal
- Enables better prediction and anticipation




# Tool: Project Charter

The QI charter is ultimately based on the goal or aim you are seeking

- Problem statement
  - Dates
  - Specifics
  - Quantify the problem
  - Difference between current/desired performance
  - Problem impact
- Background
- Goals
- Scope
- Timeline
- Team roles and responsibilities
- Resources required
- Barriers
- Approvals
- Partners



# QI Project Charter Form



## QI Basics QI Project Charter

The QI Project Charter organizes the framework of your quality improvement (QI) project and provides as summary for your project team, sponsors, and constituents.

Adapted from:

### Introduction


A project charter states the goals, scope, timing, milestones, and team roles and responsibilities for a QI project. The charter may be developed by leadership at an organization and then handed off to the QI team leader. It also may be developed by the QI team leader and then approved by leadership. The charter sets forth the scope of the work and what it so to be accomplished as part of a QI project.

### How to Use

This tool should be completed either by leadership at an organization or by the project leader with input and review by the project team. If it is not developed by leadership, it should have their approval before moving forward.

- Step through each of the fields in the template below and follow the recommended descriptions of what to include in each field.
- After completing the individual fields, review your QI Project Charter as a complete document and confirm that what your QI team will be working on and what they'll achieve is clearly described. Anyone unfamiliar with your project should be able to read the document and gain an understanding of the project and its scope.

An example QI Project Charter is provided at the end of this document for your reference.



Stratis Health | 952-854-3306 | www.stratishealth.org

### QI Project Charter

- 1. Name of project:**  
Enter name of project here.
- 2. Problem statement**  
What is the nature of the work and what are you attempting to accomplish?  
Elements of your problems statement may include:
  - Specific dates in which the problem occurred (months/years)
  - Specifics of the problem
  - Quantify the problem
  - Differences between current and desired/expected performance
  - Impact of the problem on patients, organization, staff, etc.
- 3. Background**  
Describe the history and context of your project.
- 4. Goals**  
What improvements are you seeking to achieve?
- 5. Timeline**  
What are the start and completion dates for your project and any major milestone dates?
- 6. Team roles and responsibilities**  
Enumerate the team members and specific roles. This can be done directly in the charter or utilizing the Team Roles and Responsibilities Template as an addendum to the Charter. Some typical roles are listed below.
  - Project sponsor
  - Team leader
  - Meeting facilitator
  - Group contributor
  - Data specialist
  - Systems specialist
  - Scribe / Note taker
- 7. Resources required**  
Itemize specific resources, including staff time, meeting rooms, equipment, etc.
- 8. Barriers**  
Include known barriers at the outset of your project.
- 9. Approvals**  
List any approvals that you know of, such as managerial approval for staff time devoted to your project.

Stratis Health | 952-854-3306 | www.stratishealth.org

QI Basics: QI Project Charter

# Tool: Work Plan

Describes specific tasks and activities to be done, by whom, when, progress, etc.

QI Work Plan

Task / Objective	Detailed description	Assigned To	Due Date	Completion Date	Status	Notes / Comments

# Discussion

- Does your organization use project charters and/or workplans to support QI projects?
- What benefits or challenges have you encountered while using a charter and/or work plan to support a QI team?



# Communication

# Standards of Effective Communication

- Complete
  - Communicate all relevant information
- Clear
  - Convey information that is plainly understood
- Brief
  - Communicate the information in a concise manner
- Timely
  - Offer and request information in an appropriate timeframe
- Authentic
  - Validate information

# Tool: Communication Plan

- Regular communication with all partners
- Engages colleagues and partners during all phases of the project
- Sets expectations

Components of a Communication Plan

Key Message	To Whom	From Whom	Medium	When
<message to be delivered>	<to whom message is to be delivered>	<from whom message is to be delivered>	<how message will be delivered>	<when message will be delivered>



# Communication Techniques

- Situation, Background, Assessment, Recommendation (SBAR)
- Elevator speech
- Check-back
- DESC Model
- PEARLS Model

# SBAR

- A framework to effectively communicate information
- Include the following:
  - S**ituation – What is going on
  - B**ackground – The background or context
  - A**ssessment – What you think the problem is
  - R**ecommendation – What action you would recommend



# SBAR Example – Med Reconciliation

## Situation

A patient admitted to our hospital was prescribed multiple medications at home, but discrepancies were found between their home medication list and the medications ordered on admission. This led to confusion about what the patient should continue taking, putting them at risk of adverse effects.

## Background

The patient is a 72-year-old with multiple chronic conditions, including diabetes and hypertension. They brought a handwritten list of medications to the hospital, which did not match the pharmacy records or their previous discharge instructions. The lack of a clear process for verifying and reconciling medications during transitions of care is a known challenge in our facility.

## Assessment

The lack of a standardized medication reconciliation process increases the risk of medication errors, such as omissions, duplications, or incorrect dosages. This gap could compromise patient safety and quality of care, especially for elderly patients with complex medication regimens.

## Recommendation

We propose implementing a three-step medication reconciliation process:

**Collection:** Train staff to gather a complete and accurate medication history upon admission, using standardized tools.

**Verification:** Designate a nurse or pharmacist to cross-check the patient's home medication list with current orders and pharmacy records.

**Reconciliation:** Ensure any discrepancies are resolved and updated orders are documented in the EHR, with clear instructions for the care team and patient.

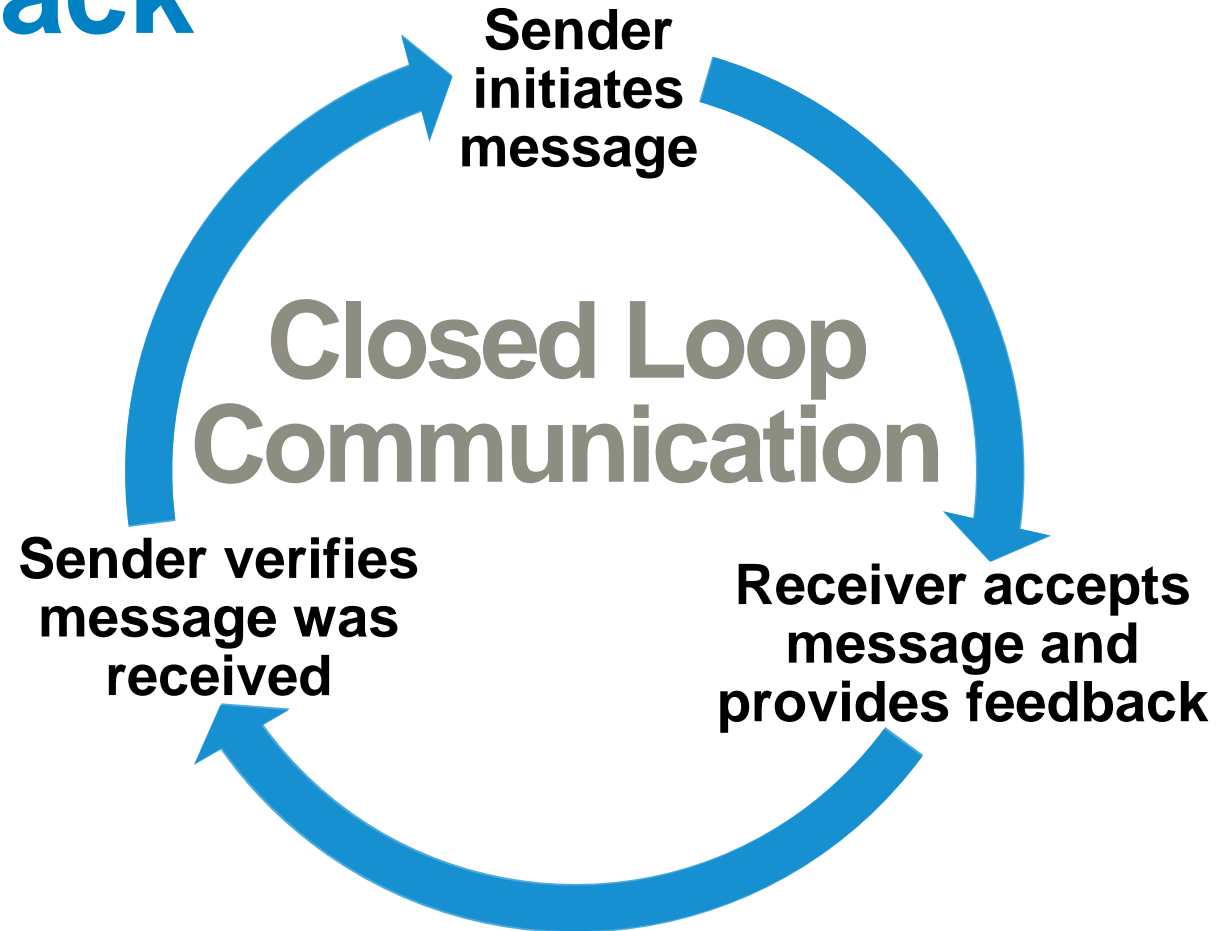
Additionally, we recommend staff education on the importance of reconciliation and assigning a champion to lead the initiative.

# Elevator Speech

We are focusing on *[INSERT]*. It is important that we improve *[INSERT]* because, *[INSERT]* will improve the health of our community. We need you to support our efforts by *[INSERT]*.

*Example:* “I’m on a team working to reduce heart failure readmissions. I know many of these patients and see how readmissions affect them. We’ve found ways to improve and have set goals for the next 3 months. We’re all committed. Can I tell you more about how you can get involved?”

# Check-back



Source: <https://www.ahrq.gov/teamstepps/instructor/fundamentals/module3/igcommunication.html#checkbackis>

# Check-back in Practice



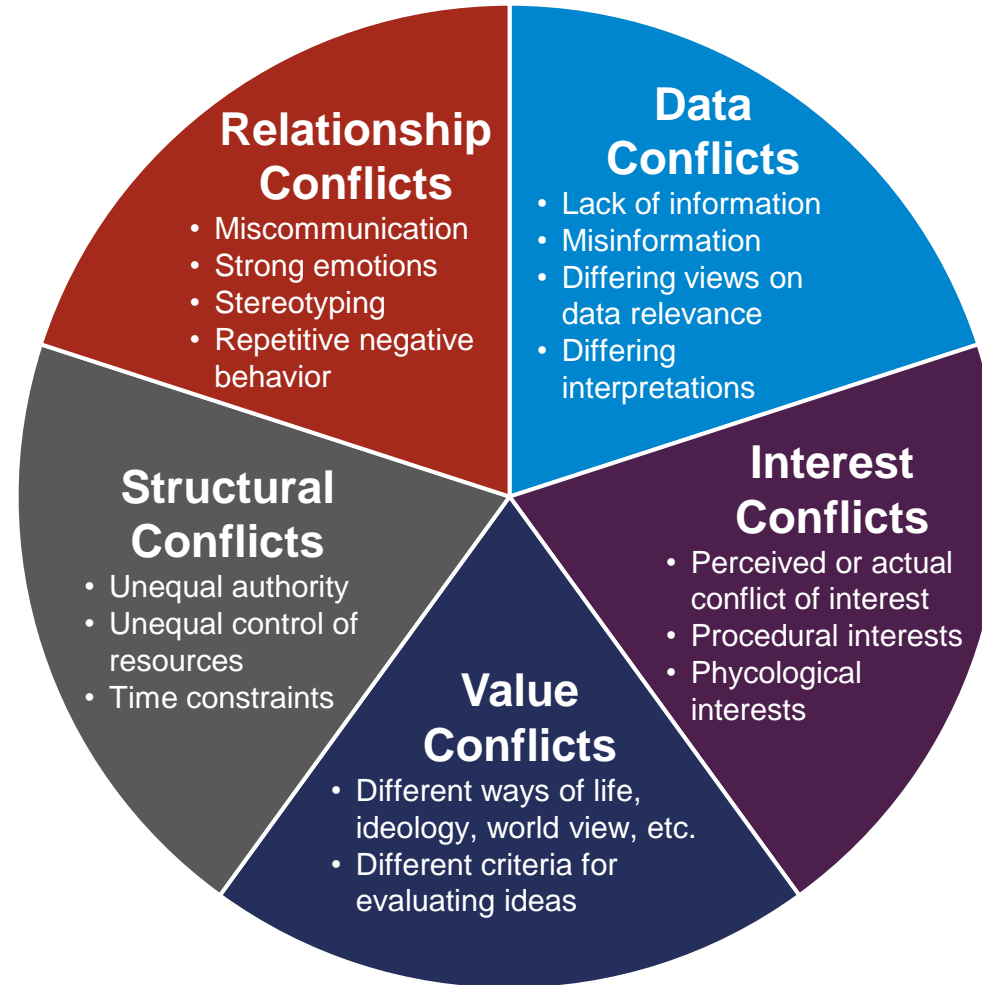
Video Link: <https://youtu.be/7-a2QBfQeA>

# Communication Challenges

- Distractions
- Physical proximity
- Personalities
- Varying communication styles
- Language barriers
- Conflict



# Understanding Conflict

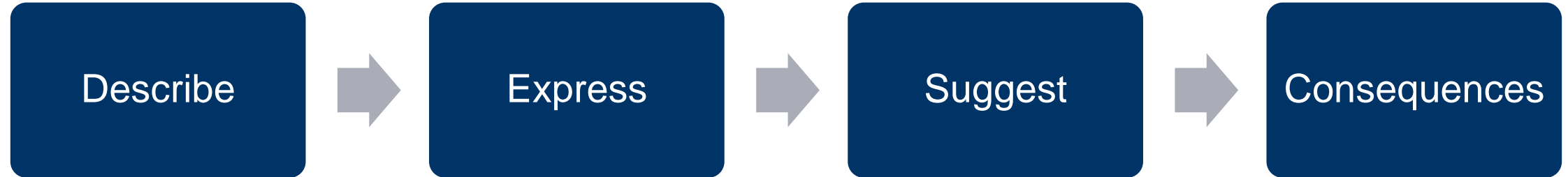


Adapted from: Christopher Moore, The Mediation Process, Third Edition (San Francisco: Jossey-Bass), 2003

# Types of Conflict Resolution

- Compromise - both parties come to agreement
- Avoidance - issues are ignored or sidestepped
- Accommodation - focus is on preserving relationships
- Dominance - conflicts are managed through ultimatums or directives for change

# DESC Model



- Be as prepared as possible.
- Give yourself time to plan and find a calm headspace
- Write out or practice aloud what you're going to say.  
Use "I" statements.
- Anticipate possible reactions and prepare your response.



# PEARLS Model

A communication tool that helps diffuse difficult situations.

**Partnership** – Emphasize that you are working together to solve the issue(s).

**Empathy** – Aim to understand and assure them you recognize their concerns.

**Appreciation/Apology** – Let the other person know that you are sorry they are frustrated.

**Respect** – Listen to fully understand.

**Legitimization** – Summarize what they shared to demonstrate that you understand.

**Support** – Let them know you will support each other to come to an agreed upon solution.

# Discussion

- What communication strategies have worked for you?
- What opportunities do you see for ways to improve communication among your teams?
- What strategies might you try?



# Wrap-Up

# Close-Out Poll


Rate the following statements :

Strongly disagree

Disagree

Agree

Strongly agree

- 
1. I understand the principles and benefits of a team-based approach to QI and can communicate and collaborate effectively with internal and external team members.
  2. The learning objectives for this session were achieved.
    - *Explain why a team approach is crucial for successful QI initiatives.*
    - *Describe how a project charter can be used as a tool to support leadership of a QI team.*
    - *Practice key communication techniques and strategies that support effective teamwork*
  3. This session met or exceeded my expectations.



# Application Homework

- Develop/review a project charter and/or work plan for your QI project
- Create an elevator speech for your QI project
- Consider a current or recent conflict you are facing. Can you identify the 'root causes' of the conflict?
- Consider ways to incorporate DESC or PEARLS into challenging conversations

# Prepare for Session 4



## Review Modules

- [Organizational Culture and Change Management Basics](#) (9-minute video)
- [A Culture of Quality](#) (13-minute video)



## Review Tools & Resources

- [Force Field Analysis](#)



## Review the following report:

- [Building Sustainable Capacity for Quality and Organizational Excellence: Core Elements of CAH Quality Infrastructure](#)

# Bonus Content

## Additional QI Basics Modules:

- [Project Teams and Leadership](#) (9-minute video)
- [QI Charters and Workplans](#) (12-minute video)
- [Communication Techniques](#) (8-minute video)

## Additional Resources:

- [TeamSTEPPS 3.0 |ahrq.gov](#)
- [TeamSTEPPS Video Toolkit](#)
  - [DESC Video Toolkit](#)
  - [Shared Mental Model Video Toolkit](#)
  - [SBAR Video Toolkit](#)

# For more information contact

**Janelle Shearer**

952-853-8553

[jshearer@stratishealth.org](mailto:jshearer@stratishealth.org)

**Nicole Gackstetter**

952-853-8512

[ngackstetter@stratishealth.org](mailto:ngackstetter@stratishealth.org)

To learn more about Stratis Health go to [www.stratishealth.org](http://www.stratishealth.org).



This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) as part of an award totaling \$928,510 with 0% financed with non-governmental sources. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by MT DPHHS, Montana Health Research & Education Foundation (MHREF), HRSA, HHS, or the U.S. Government.

