**Team Formation Tools**

Team formation is a process of forming a functioning team where people work together to achieve a clear and compelling common goal.

**WHY**

Issues involving complex, cross-functional processes cannot be successfully and sustainably resolved by one person, manager or leader. Forming a multidisciplinary team allows input, expertise and cooperation from vested stakeholders and persons involved in the process. The shared ownership and commitment of a team with a common purpose, vision, priority and plan results in sustainable solutions.

**WHEN**

Forming a team is one of the initial steps in the improvement effort, prior to first on-site training session.

**HOW TO**

1. Identify the process that requires improvement
2. Identify the cadres involved in the process, selecting a representative from each cadre
3. Select all team members (see Team Members: Roles & Responsibilities)
4. Secure resources and permissions for team members to participate in the improvement project
5. Invite team members (see Invitation Letter for Team Members)

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| **TIPS*** Select team members that possess:
* A high level of energy and commitment
* Desire to improve and use resources more efficiently
* Creativity & Innovation
* Ability to learn quickly
* Availability and appropriate supervisorial permission to participate in team meetings
* Form a core team that meets consistently, inviting other members as needs arise
* Consider forming two subsets of the team, one central and one at the site, if the site is distant from the headquarters
* The ideal number of members for a core team is 6-8 persons.
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**Templates:**

* Project Outline
* Invitation Letter for Team Members

**Team Members: Roles & Responsibilities**

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| **Team Member** | **Role & Responsibility** | **Potential Persons** |
| ***Champion/Sponsor*** | * Accountable for/vested interest in project outcome
* Helps identify/remove barriers to progress & obtain necessary resources
* Ensures activities are linked to organizational strategy
* Ensures appropriate people are involved in project
* Periodically reviews team progress
 | Key StakeholderLeader/Administrator |
| ***Team Leader*** | * Guides and manages day-to-day team activities
* Keeps team focused on goals
* Plans, coordinates & chairs meetings and events; Oversees meeting agenda
* Oversees team accountabilities & resources
* Provides subject matter knowledge & shares workload
* Works closely with the champion and coach
 | Manager of front-line team membersProcess Owner |
| ***QI Expert/Coach*** | * Consults, advises and provides feedback as needed
* Coaches and educates team members
* Ensures tools, concepts and techniques applied correctly
* Make resource connections as needed
* Attends meetings
* Communicates expectations
* Works closely with the champion and team leader
 | Person with QI trainingPerson with QI experience or expertise |
| ***Data Manager*** | * Collects & analyzes data
* Presents data graphically
* Reports data
 | M & E (Monitoring & Evaluation) Person |
| ***Front Line Team Member – Each Cadre*** | * Have direct first-hand knowledge, i.e., “touch the process”
* Committed to team’s purpose / Share in team’s success
* Attend the QI training and team meetings
* Participate fully in activities – Volunteer/complete action items
 | One member of each cadre who touches the process, i.e., Multidisciplinary |
| **Additional Team Members/Roles -** Assign as Needed based on Project needs |
| ***Content/Subject Matter Expert*** | * Expert on technical matters or evidence-based practice/s
* Contributes as needed; Will not necessarily attend every meeting
 | Expert in needed discipline |
| ***Project Manager*** | * Keeps project on track for completion
* Organizes project/activities
* Manages/maintains project management folder/s
* Assists team leader in coordinating events/meetings
 | Project ManagerPartner/NGO |
| ***Outside Eyes*** | * To see & think about the process/solutions without bias or “knowledge” of the process
 | Person unfamiliar with the process |

**Invitation Letter for Team Members (Template)**

Greetings,

**What:** Welcome to the Viral Load Scale-up Quality Improvement Collaborative. A quality improvement collaborative is an important activity undertaken to improve patient care as well as our work environments and processes. This project will address and improve one phase of the viral load scale-up process for (Insert location/s).

**Who:** This communication is to inform you that you have been chosen by leadership to be a team member on this project. As a member of this approved multidisciplinary team, you will not only learn about multiple quality improvement methodologies, you will actively implement meaningful process improvements.

**Team Members**: Ideally will possess a high level of individual commitment, a desire to improve and use resources more efficiently, creativity, innovation and an ability to learn quickly.

Active team members are: List team members

**When:** The collaborative project will extend over a 6-month period. Attendance at four learning sessions, each occurring over 2-3 days, is expected. Sessions are tentatively set for April, June and August 2018**.**

In addition, a Pre-Training Orientation has been scheduled for (date, time, and location of pre-orientation). All active team members should attend our first introductory meeting. Schedules permitting, our (Sponsor/Champion) has/have also been invited to attend. The purpose of this meeting is to provide introductions, review/discuss the charter, discuss future meeting dates, and answer questions about the Quality Improvement Collaborative. Please take a moment to review the attached documents prior to the pre-training orientation meeting on (date of pre-orientation/training).

**Attachments:**

* Agenda
* Charter: outlines project description

**Thank you:** Thank you for your commitment and support. By focusing on quality and safety through process improvement, we can improve the lives of our patients and our work environments.

With appreciation,

Team lead name