

Team Meeting I: Mapping Your Office Flow for Optimal Asthma Care

Learning Session 1

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RUTH S. GUBERNICK

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CME OBJECTIVE

- Describe key elements of effective team meetings



SESSION OBJECTIVES

- Participate in a team meeting using effective team meeting skills
- Use flow charting to document your current asthma visit work flow, including roles and responsibilities
- Discuss modifications to work flow, to be tested



EFFECTIVE TEAM MEETING SKILLS



Effective Meeting Skills

- What is a productive and effective meeting?
- Establish meeting ground rules
- Meeting roles
- Standing meeting agenda
- Evaluate the meeting





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EFFECTIVE QI TEAM MEETINGS

- Provide a time and space for regular shared learning and review of data
- Get to the tasks at hand in a *timely* manner
- Set actions for the meeting and actions are completed or there is a determination of next step
- Provides a venue for building trust and collaboration among participants
- Encourage participation by all on the team– everyone has a unique perspective that is essential to solving problems



SETTING GROUND RULES/NORMS

- Invite everyone's input
- Keep the list of norms to ten or so
- Post during future meetings or include on meeting agendas to remind each other
- Agree as a team that we will use these rules/norms
- Reference them as a way to get back on track when needed while you are meeting



EXAMPLE GROUND RULES:

- Start and end on time
- No sidebar conversations
- Come prepared and ready to contribute
- Don't interrupt the person speaking
- Be open to hearing other people's perspectives
- Question assumptions
- Speak only for yourself
- Honor the group
- Be honest
- Be respectful
- Create a safe environment
- Share all relevant information.
- Everyone has a chance to speak without interruption
- No idea is a bad idea. All ideas and opinions will be respected
- Individuals' personal comments remain confidential
- Give specific example
- Speak about interests not positions
- Capture decisions and action items
- Silence means agreement
- Consensus, majority vote, or unanimous agreement are the way to make decisions
- Raise hands when you want to speak
- Make decisions based on clear information.
- Accept the fact that there will be differences of opinion.
- Attack the problem, not the person- "no blame game"
- Share time so that all can participate
- End meeting with a list of follow-up items and the person responsible for each



MEETING ROLES

Leader

Prepares the Agenda,
and helps move the team
through the agenda by eliciting
participation from all



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MEETING ROLES

Facilitator

- Manage the group process and ensure balanced participation by all members of the group.
- Alert the group when the discussion is not focused on the agenda.



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MEETING ROLES

Recorder

Keeps the visual record for the team and tracks the “next steps/action” and parking lot lists.



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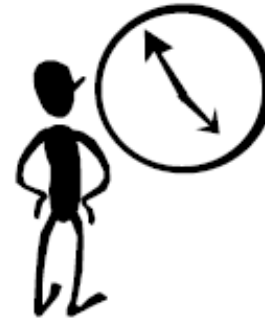


MEETING ROLES

Timekeeper

Keeps the team on time through tracking time remaining for each agenda item and when necessary requesting the team to re-negotiate time to complete discussions and actions.

- Announce 1/2 way through the time
- Give a one minute warning
 - Time is up



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MEETING ROLES

Participant

- Follow Ground Rules!
- Keep an open mind to new ideas
- Arrive early to start on time
- Communicate with all staff to share progress and gain their interest and ideas
- Have Fun!



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EFFECTIVE QI MEETINGS

- Create an agenda
- Assign a facilitator for next meeting
- Make sure leader has input on agenda
- Assign a recorder and timekeeper
- Limit number of topics to 6 or less
- Assign a time for each topic
- Focus on action (testing! PDSA cycles!)
- Make sure to consider who needs communication in your practice post meeting
- Parking lot topics not covered
- Quick evaluation of the meeting (what went well? could improve? did we follow ground rules?)



EVALUATION OF MEETING

Plus/Delta is a simple, quick (5–10 min), and effective evaluation tool that works very well for this. To use, draw a vertical line down the center of an easel pad. At the top of the left column put a plus sign; at the top of the right put a triangle or delta sign.

Plus: write comments from meeting attendees about what went well during the meeting or what should be continued or brought forward for the next meeting

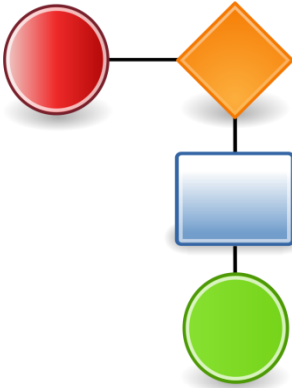
Delta: write comments about what could be improved or done differently



FLOW CHARTS



THE PURPOSE OF WORKFLOW CHARTS

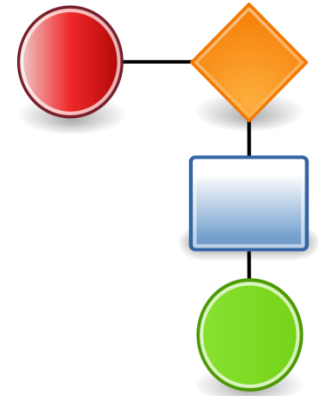


Creates a picture of the sequence of steps in a process

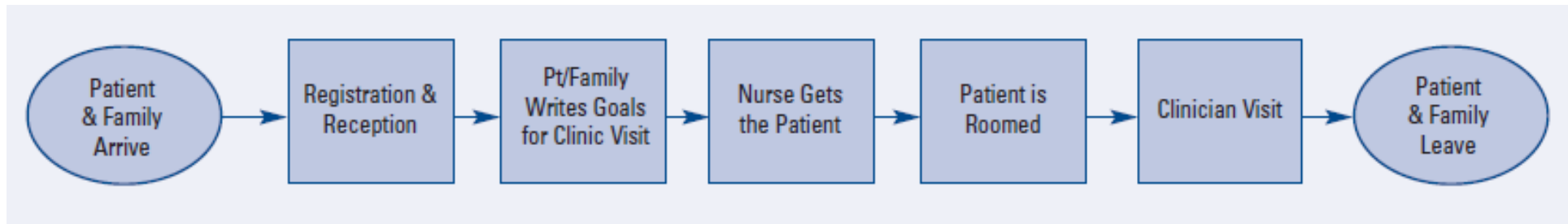


THE BENEFITS OF WORKFLOW DIAGRAMS

- Engages all members of the practice
- Replaces pages of written word with a picture
- Illustrates waste, delays, missteps and duplication in the process being studied
- Builds consensus within the practice
- Corrects misunderstandings about a process
- Builds common understanding of the process



SIMPLE FLOW CHART EXAMPLE



Clinical Assessment Process Map – Paper Chart System

Office Visit - Prework

Asthma patients identified at the front desk

During office visit

At time of parent check in, encounter form is removed from top of folder, given to parent and parent is asked to fill out their part of the encounter form Questions 1-10

Once parent input is completed the form is returned to the top of the chart

Patient is ready to be seen by Physician

During the visit the physician fills out the remainder of form while having informed clinical discussion Questions 11-27

Patient with new diagnosis of Asthma, form is pulled and filled out concurrently

Completed form returned to chart, then chart to 'finished chart' box

Is there an opportunity for completeness check at this point in the process

YES

NO

Physician completes the form immediately after the visit

Post visit Activities

Nurse Leader removes encounter form and verifies for completeness

YES

NO

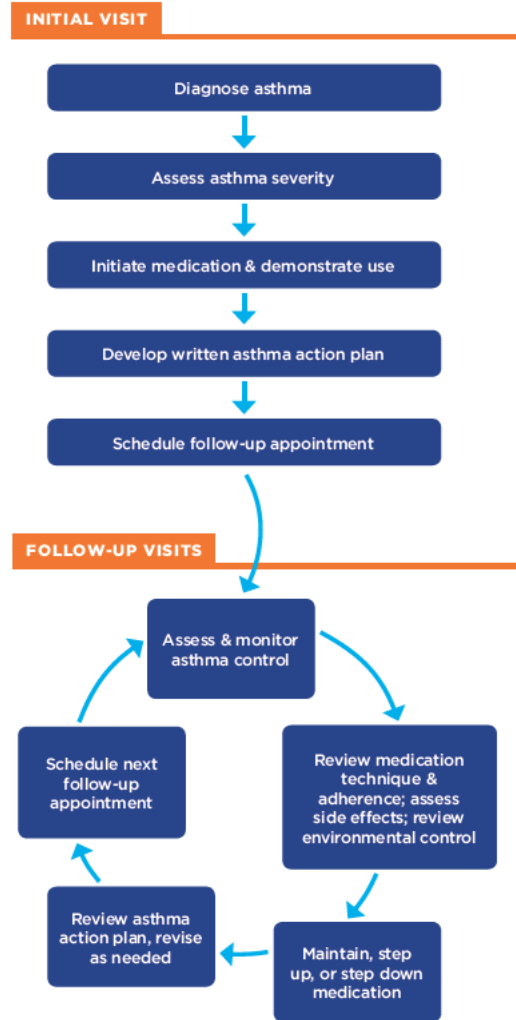
If necessary circle back with Physician or patient family by phone to obtain missing information

All necessary information on the form is entered into EQIPP and Registry (if you have one), no incomplete entry, no batching

List of active patients without forms is regularly generated reviewed and updated

Any patients with missing forms are targeted for pro-active communication during FluShot Season: Post-card, Phone call and letters

STEPS TO CONSIDER FOR ASTHMA CARE FLOWCHART



TIPS FOR USEFUL FLOW CHARTS

Do's

- Draft the current process before the ideal process
- Ask for input of all members of the practice, including patients
- Observe the process directly or ask a patient to give their perspective
- Draft the flow chart with post-it notes with all members involved
- Place the draft in a public place before finalizing

Don'ts

- Have one person or discipline complete the chart
- Use a pre-determined template



FLOWCHART DEVELOPMENT

- Reference the flow charting diagram
- Use Post It notes so you can move things around
- Identify who is responsible for each step in the workflow
- Note where there are unknowns and determine changes to test to create a highly reliable workflow



TEAM MEETING #1: Time For Action: Create Your Workflow!

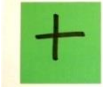



TEAM MEETING #1 AGENDA

- Identify meeting roles for today's meeting (2m)
- Develop written ground rules for QI team meetings (today and in the future) (5 m)
- Map steps for asthma patient in your practice
 - Pick one type of visit (initial or follow up) and build out (20 m)
- Evaluate the meeting (plusses/deltas) (2 m)



DEBRIEF YOUR MEETING

- Use the  
- Or, ask everyone to score the meeting on a 1-10 scale (higher number = more effective and efficient). What is average, median, how much variation in scoring...
- Discuss with entire group on report out



QUICK REVIEW: THE BENEFITS OF WORKFLOWS

- Engages all members of the practice
- Replaces pages of written word with a picture
- Illustrates waste, delays, missteps and duplication in the process being studied
- Builds consensus within the practice
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BENEFITS OF EFFECTIVE MEETINGS

- Gets the job done
- Engages everyone
- Improved communication
- Allows ownership
- Increases efficiency



QUESTIONS?

