

Working in Teams: Unit 3

Initial Tools for Teaming: Ground Rules and Action Plans for HIT Teams



Unit 3 Objectives

At the end of this unit the learner will be able to:

1. Create and describe SMART ground rules.
2. Develop and refine a team action plan.
3. Establish ground rules and an initial action plan for an HIT team.

Unit Outline

Overview of Team Member Expectations and Ground Rules
Setting team ground rules
Setting ground rules
SMART ground rules
Examples of ground rules
Activity-Developing Ground Rules
Development of an Action Plan
Purpose of an Action Plan
Elements of an Action Plan
Tools for Action Plans (PERT, MS Project, WBS, Gantt)
Activity- Create an Action Plan
<i>Tools for Teaming</i>
<i>Activity - Create Ground Rules for an HIT team</i>
<i>Summary/Conclusion</i>

Team Member Expectations and Ground Rules

Coach John Wooden's six rules for creating an effective team included (Wooden, J, 2007):

1. Consider team spirit and morale.
2. Be alert to spot the good competitors and the poor ones.
3. Be alert for potential troublemakers and get rid of them.
4. Give each individual a fair chance and every opportunity he or she earns.
5. Consider fight, determination, courage, and desire.
6. Look for cooperation and good attitude.



Setting Team Ground Rules

- Ground rules should focus on three elements:
 - Tasks – Expected activities and deliverables for the team.
 - Process – How the activities will be carried out.
 - Norms – Ways in which team members will interact with each other.

Setting Team Ground Rules

- Ground rules are an important tool for helping individuals function together as a team. They should be:
 - Clear
 - Concise
 - Consistent
 - Agreed-to
 - Followed
 - Re-enforced
 - Updated

Setting Team Ground Rules

- Ground rules should be:
 - Clear
 - Concise
 - Consistent
 - **Agreed-to**
 - **Followed**
 - **Re-enforced**
 - **Updated**
- } Process Monitor

SMART Ground Rules

- Ground rules should be written to be:
 - Specific
 - Measurable
 - Attainable
 - Relevant
 - Timely (Time Bound)

Examples of Ground Rules

Here is an example of one team's rules:

1. Project objectives are measurable and can be achieved in the short term.
2. Project work plan and implementation plan are clearly defined.
3. The problem is studied before a solution is created.
4. Meeting minutes are posted and feedback is provided.
5. Skeptics are involved on the Team.
6. Team members communicate daily with each other.



**Activity I: Developing Ground Rules-
Personal Reflection**

Consider a team you were a member of that was a very positive and successful team experience. List between 4 and 6 key reasons you believe that team experience to be positive and successful.

Next, consider a team you were a member of that was not a positive nor a successful team experience. List between 4 and 6 key reasons you believe that team experience to be neither positive nor successful.

**Activity I: Developing Ground Rules-
Personal Research**

Now that you have reflected on your own experiences with teams, both positive and not so positive, spend some time researching what others have provided as guidelines or ground rules for working in teams. Write an abstract (200 words maximum) that displays insights from two independent reference sources.

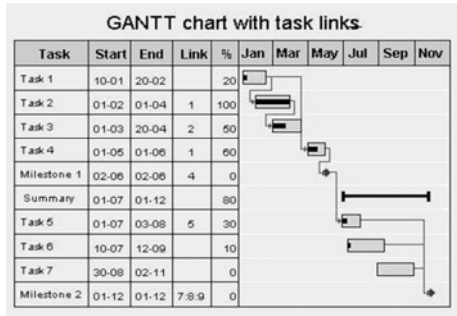
Next, develop a listing of 6 key ground rules that you would recommend be considered by your next team.

Why Create an Action Plan?

**“By failing to prepare,
you are preparing to
fail.” – Benjamin
Franklin**

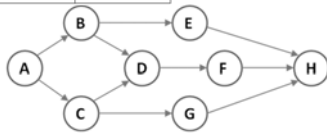


GANTT Chart



PERT Chart

Activity	Name	Predecessors	Estimated Activity Duration (weeks)
A	Launch the Project	None	5
B	Prototype the User Interface	A	5
C	Develop System Requirements	A	6
D	Design and Code the System	B, C	13
E	Develop User Training	B	6
F	Conduct Testing	D	4
G	Document the System Description	C	9
H	Deliver the System	E, F, G	2



Activity II: Developing an Action Plan- Personal Reflection

Consider a project or an important event that you have ahead of you. Use one of the approaches listed above to develop an action plan you believe would be the most appropriate combination of individual tasks necessary toward successfully accomplishing the project or event. After developing the action plan, reflect on why you selected the specific tool you used and how well it worked.

Tools for Teams

- Ground rule documentation
- Action Plan – action plan templates, project plans, WBS, Gannt, PERT, accountability templates, action item lists
- Meeting agendas
- Meeting minutes
- Data information tables and templates

Unit Assessment: Developing Ground Rules and Action Plan for HIT Team

- Providers of an outpatient clinical facility are requesting an upgrade to the current ordering system to include the latest feature of ePrescribing. This will include an upgrade of both the software and hardware of the current system to offer this feature. All providers will use this system for writing patient prescriptions and sending the prescriptions to any of 50,000 regional pharmacies depending on patient requests.
- Team composition –
 - 1 Office Manager
 - 2 Nurses
 - 1 Secretary/Receptionist

Unit Assessment: Developing Ground Rules and Action Plan for HIT Teams

Features of the system should include, but not limited to, ability to "write" prescriptions based on the local formulary of medications, print or transfer prescription either by fax or electronic interface to the pharmacy of patient's choice, ability to store a medication history for each patient including active, inactive and discontinued medications, when medications were last prescribed, up-coming needs for prescriptions, workflow allowing ancillary personnel to take a phone request for a new / refill medication for the prescriber to approve before being sent to the pharmacy, upload of 3rd party information about regional pharmacies, and real time insurance verification for allowed medications based on insurance coverage.

The requirements set by the clinic for ePrescribing will drive the action plan.

- Team composition –
 - 1 Office Manager
 - 2 Nurses
 - 1 Secretary/Receptionist

1. You are to create initial Ground Rules for the team
2. You are to create an action plan with the mentioned resources and divide the tasks among the team, assign deliverable due dates and determine when those deliverable dates are slipping.

Summary and Conclusion

Now that you have completed Working in Teams, Unit 3: Ground Rules and Action Plans for HIT related activities, you should be able to:

- Create SMART ground rules
- Develop a team action plan
- Other tools for teams
