

## QI in CITY & HACKNEY FACTSHEET 2: Roles, responsibilities and expectations

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There are a number of different roles involved in QI, which play a key part in taking Quality Improvement work forwards.

### Project Leads

The core of all QI projects is the project team and at the heart of the team is the Project Lead. Project Leads need to provide the energy and momentum to move QI projects forwards. This will involve committing to using QI methodology, with the help and support of QI coaches/Improvement Advisor (see further detail below), but also very importantly leading and organising the project team to move forwards. Any member of staff, service user or carer at ELFT can be project leads, as long as they possess the qualities and time to be able to lead the project and undertake the tasks and responsibilities as set out below. This will ultimately be decided by the QI Forum.

There is no getting away from the fact that this role will take some time. QI projects in C&H and across ELFT have achieved incredible things, but successful projects have always required this energy and commitment. We have also seen projects fail when this has been absent.

QI projects meet for an hour every 2 weeks, but sometimes more frequently and sometimes for longer. In addition to this, the project lead will be responsible for tasks associated with the project, such as those listed below, to ensure they get the most out of project team meetings and that they are as efficient as possible. This is not to suggest that the project lead has to do everything; but it is up to them to ensure things are clearly delegated across the team. Please also see the section in the QI Guide on top tips for running effective and efficient team meetings.

### Project Leads: Responsibilities & Tasks

- Coordinate meetings: ensure all team members, coach and sponsor are invited<sup>1</sup>, organise agenda (see above top tips), record actions, track actions between meetings
- Monitor progress of project and regularly update your sponsor on progress (at least monthly). You can do this verbally or by email
- Liaise with your sponsor and/or coach regarding challenges faced by the project team.
- Ensure the involvement of your customers (usually service users and/or carer) in the project and seek the support of the Patient Participation Lead for Hackney if needed to help with this.
- Ensure that the project team communicates and connects effectively with your broader service team, via broader team meetings, away days, noticeboards, etc.

<sup>1</sup> Coaches and Sponsors will not attend every meeting (Coaches will likely attend most meetings at the beginning), but it is helpful for them to have the meetings in their diaries so they know when they are happening, so they can attend when possible (see further information about Coach and Sponsor role below).

- Encourage a participative and non-hierarchical dynamic within the team meeting, participating as a team member, contributing ideas and participating in the team processes and decisions.
- Develop your knowledge in QI methodology and, with the support of your QI Coach/Improvement Advisor, do your best to apply this to the project
- Attend and share the progress of the project with the QI Forum when requested (see below)
- Become an active use of QI Life to manage the project and encourage team members to do the same.

### QI Coaches

QI Coaches are people within our services, who have an enhanced level of training in coaching QI methodology and time allocated and agreed to support QI project teams. In City & Hackney the amount of time coaches have available is agreed with them individually and they are allocated a specific number of projects on this basis, based on the notion that they will attend most project team meetings and will spend up to an additional hour doing preparatory or follow-up work. Otherwise their time is spent in their standard role.

As a result, it is very important that coaches are not understood as the “do-ers” of QI projects. They are there to support project leads and teams with all elements of the methodology – and sometimes this will need them to actively undertake work for the project – but in most cases the tasks associated with the project will need to be undertaken by other members of the project team.

There is another important reason for this. We want the use of QI tools and methodology to be disseminated throughout City & Hackney, with all staff building confidence and skills. Coaches will therefore look to enable and develop project team members to use the tools themselves; coaching and teaching people to use them with their team, rather than doing it for them. They will often therefore recommend doing and leading things in partnership with the project lead/team; such as building a spreadsheet for capturing data or facilitating a process mapping session with the broader team to help develop others’ skills.

QI Coaches also have a broader role beyond their project teams, supporting sponsors to lead QI more broadly in the directorate. They will therefore be expected to prioritise the monthly QI Forum. Specific tasks and responsibilities of QI Coaches are outlined below. The C&H Improvement Advisor (see below) provides support to the QI Coaches.

### QI Coaches: Responsibilities & Tasks

- Helping to engage people and teams in QI
- Supporting both potential (pre-approved) and existing project teams to develop ideas and strategy, using QI tools and advising on how to complete project documentation
- Attending their allocated project team meetings as required (this frequency should be discussed with the project lead and will likely vary over the course of the project. New project teams generally require more support than well-established project teams, so

coaches will likely attend almost all meetings in the beginning, but reduce the frequency and things progress and the project achieves results)

- Supporting project teams to use all elements of QI methodology, including the key areas of data over time, testing through PDSA, understanding the interconnectedness of our system, the human side of change, the implementation stage of QI projects and scale-up
- Develop skills and confidence in facilitation, teaching and explaining the use of QI tools and methods
- Attend the monthly QI Forum and monthly support session with the directorate Improvement Advisor
- Develop relationships with QI sponsors and contribute to the strategic leadership and development of QI in the directorate (for example via the QI Forum, annual IHI visit and other opportunities)
- Update the coaching progress notes on QI Life and liaising with the project sponsor if there are concerns about the project (there is an opportunity to do this within the QI Forum (see QI Forum Terms of Reference – Orange Flags below)

**If you are a project lead and don't know who your coach is please contact the Interim City & Hackney Improvement Advisor: [Kelly.Gale@nhs.net](mailto:Kelly.Gale@nhs.net) .**

### QI Sponsors

QI Sponsors are senior members of the Directorate Management Team, who are responsible and accountable for leading the QI Programme in City and Hackney. This includes both the progress of individual QI projects, but also strategic thinking and leadership around the broader programme (see further detail below).

Each QI project in City & Hackney has a QI Sponsor to which the project is accountable for progressing the work. Sponsors will have between 2-5 projects which they sponsor and in almost all cases these will be aligned to their operational responsibilities.

**If you are a project lead and don't know who your sponsor is please contact your Improvement Advisor: [Kelly.Gale@nhs.net](mailto:Kelly.Gale@nhs.net) .**

The monthly QI Forum provides a core mechanism to enable sponsors to undertake this role, alongside other members of the DMT, who will also support this work. It is therefore expected that QI sponsors prioritise attending the Forum in their diaries.

The Improvement Advisor from the central team supports QI sponsors in all elements of their role. This is mainly via the QI Forum and monthly meetings with the lead Sponsor and directorate lead for the QI Programme in City and Hackney, Dr David Bridle, however sponsors also contact the Improvement Advisor directly for individual support and discussion.

Specific tasks and responsibilities of QI Sponsors are outlined below, split into their programme leadership role and their role in individual projects.

## **QI Sponsors: Responsibilities & Tasks – QI Programme Leadership**

- Developing the Directorate’s quality improvement priorities and engaging in dialogue with teams to align projects
- Allocation of resource and effort to the directorate’s QI work
- Approval of new QI projects & determine when projects should be closed (via the QI Forum)
- Thinking and leadership around scale-up of QI work
- Identifying and recruiting appropriate people for different levels of QI training & identification of new QI coaches
- Troubleshooting, strategizing and taking action around general issues/restraining forces within the QI programme
- Ensuring we celebrate, share and learn from successful projects
- Scan the monthly reports on progress of QI projects in C&H
- Prioritise attending the monthly QI Forum in the directorate

## **QI Sponsors: Responsibilities & Tasks – Role in QI Projects**

- Provide support and constructive challenge to the project lead around the formation of the project team and strategy (e.g. Is there a stable team, are all key stakeholders represented/engaged? Is there progress service user/carer involvement?)
- Provide support to address and blockers and issues in the project (particularly of a service nature, as opposed to use of QI methodology, which the Coach will help with)
- Provide supplementary leadership if required to get projects moving to the testing stage (although this should be largely provided by the project lead and should be flagged to the QI Forum if there isn’t quick progress with this)
- Ensure they have a sense at all times about how their allocated projects are progressing, or seek updates from the Project Lead if this is the not the case.
- Review closely the progress notes on their projects, provided by the coach and liaise with coaches directly if needed

### **Clinical Director; Directorate Lead for the QI Programme in City and Hackney**

The Clinical Director, Dr David Bridle is the overall lead and, in effect, the lead sponsor for the QI Programme in City and Hackney. He provides visible leadership to progress the QI programme, overseeing all programme leadership responsibilities & tasks of sponsors. He is also accountable to the central QI Programme Board, chaired by the Chief Executive, for the progress of the City & Hackney QI Programme.

Specific tasks and responsibilities of the Directorate Lead for the QI Programme in City and Hackney are as follows:

- Providing additional leadership and drive to deliver all programme sponsor leadership responsibilities and tasks, as set out on the previous page

- Ensure effective functioning of the structures and processes within the directorate to support QI
- Appoint QI sponsors and coaches and work with sponsors/ managers to ensure roles are embedded in job plans and appraisal objectives
- Understand the role of QI within the whole quality system and work towards a balance between Quality Assurance, Quality Improvement, Quality Control and Quality Planning
- Lead the DMT, QI Forum and other sponsors in planning capability building and talent development in relation to QI and deploy skills and capacity to QI efforts
- Chair the QI Forum
- Work with sponsors and coaches to address any challenges they are experiencing in undertaking their role
- Meet with the directorate's Improvement Advisor and others regularly to take forwards the above objectives

### City & Hackney's Improvement Advisor

Improvement Advisors support a number of directorates to progress their QI Programme, as well as delivering training to staff, helping to promote and share the successes of the QI programme and leading work on Trust high priority areas. In terms of high priority areas, the role includes leading the Trustwide strategic approach, organising and supporting Trustwide meetings and forums and providing first line support for projects working on these areas within their local directorates. In this latter sense, the Improvement Advisor role in high priority projects is like that of a QI coach, described above. Specific tasks and responsibilities of Improvement Advisors in directorates are below. The Improvement Advisor supporting City and Hackney is Jen Taylor-Watt. Jen will be on leave from 1<sup>st</sup> December 2017 and C&H's Interim Improvement Advisor will be Kelly Gale.

### Improvement Advisor: Responsibilities & tasks in directorates

- Providing first-line coaching support to high priority projects, as described above under QI coaches
- Strategic support to the directorate QI programme in all respects: in defining improvement priorities, aligning QI work, identifying whether issues are suited to QI projects, supporting thinking around scale-up of QI work, etc.
- Troubleshooting, strategizing and taking action around general issues/restraining forces within the QI programme
- Attending, helping to coordinate and developing the approach of the QI Forum
- Supporting the directorate to celebrate, disseminate and learn from successful QI projects
- Provide monthly group supervision to QI coaches and individual support/shadowing opportunities to coaches when needed
- Be attuned to progress of projects across the programme and highlight to the sponsor/Clinical Director/QI Forum when projects aren't progressing or when the support structure is weak

### **People Participation Lead (PPL)**

People Participation Leads play a key role in supporting and enabling service user and carer involvement in all respects across ELFT, including QI.

Ways in which the PPL can support project leads and teams are outlined in the section below. The PPL for City and Hackney is Helena Maine.

### **Quality & Clinical Governance Coordinator**

City & Hackney's Quality & Clinical Governance Coordinator, Maryam Hussein, supports the work of the City & Hackney QI Forum, alongside other responsibilities covering audit, clinical governance, etc.

Maryam works with the Improvement Advisor to help coordinate the QI Forum and undertakes other ad hoc tasks to link and communicate with services around QI.