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# Sherry Campanelli and Laura Newhall on The Best Laid Plans: Navigating the Potholes and Pitfalls of Group Facilitation

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## Facilitation Not Dictation: How a QI Team Succeeds

Hi. We're Sherry Campanelli, Program Compliance Manager and Laura Newhall, Clinical Training Coordinator, from the University of Massachusetts Medical School's [Disability Evaluation Services](#) (DES). Although DES conducts evaluations regarding whether an applicant for public benefits can be found disabled, evaluation as a research endeavor is not our primary focus. Nevertheless, as an organization, we are committed to ongoing quality improvement efforts to enhance our services for people with disabilities. We use a team-based iterative approach to define and address problem functions and processes.

For example, we used the process described herein to develop Quality Assurance systems for our clinical, clerical and technical support processes. We have also used this method to tackle caseload backlogs, and effective processing of incomplete applications.

We've discovered over time, regardless of the issue or problem involved, that there are common techniques that help a quality improvement (QI) team be successful. We would like to share some of these lessons learned with you.

### Lesson Learned:

- Determine and clearly state the issues to be solved and team goals.
- Involve key staff (line staff doing the work and managers supervising the work) in the development of any QI initiative. They are in "the know" about areas that may be problematic.
- Incorporate non-judgmental facilitation to keep up the momentum. Key components include:
  - Involving all participants in decision making/discussion;
  - Keeping meeting minutes and agendas;
  - Keeping track and sharing "to do" lists, "next steps" and progress towards goals;
  - Meeting on a regular and ongoing basis (don't cancel meetings unless absolutely necessary);
  - Seeking management decisions and input as needed; and
  - Making sure you hear from the quiet folks in the room – they may need a little encouragement to speak up, but often offer great insights.
- Utilize team members/subcommittees to perform specific tasks between meetings.
- Utilize *available* qualitative and quantitative data.
- Collect specific data, as necessary, to help define the problem and suggest solutions.
- Do fact finding to support decision-making.

- Maintain a “living” working document(s) as decisions are made to be incorporated into a final product.
- Utilize pilot testing to determine feasibility and make changes (i.e., “fix bugs”) prior to full implementation.
- Provide periodic communication to the rest of the department or organization during the project and at its conclusion.
- Train all impacted staff on process improvements.
- Conduct periodic assessments after implementation to assess success of the project.
- Refine processes as new issues and changes occur.

#### Hot Tips:

- Sometimes QI processes take longer than expected. “Keep going even when the going is slow and uncertain.” G.G. Renee Hill
- “To discover new ways of doing something - look at a process as though you were seeing it either for the first or last time.” Mitchel Martin