

HealthEast Project Roles

(adapted from IHI definitions)

Executive Sponsor

- Supports and represents the Team from an organizational standpoint within leadership councils and cross-functionally.
- Demonstrates commitment to the project
 - Inspires the team and the organization toward achieving the vision
 - Validates team member roles and priorities of the council/committee/project
 - Sets example for behavior conducive to achieving goals
 - Attends team meetings periodically, such as at kick-off, milestones, and as agreed upon between Project Leader and Executive Sponsor
- Meets regularly with Project Leader and Performance Improvement Specialist.
- Ensures proper interpretation of charter.
- Drives accountability for appropriate timelines, milestones, and quality results.
- Serves as a conduit for organizational decisions and context to the Team.
- Brings issues, progress, and integration needs to leadership councils.
- Ensures the resources needed for the team to achieve its aim.
- Builds bridges toward and removes barriers to achieving aims.
- Drives the case for change into organizational systems.
- Presents formal project updates to appropriate councils as needed and as scheduled.
- Role exists until the improvement, change, implementation has become a part of regular work and spread phase is complete.

Project Leader (Owner)

- Leads the project and is accountable for incorporating outcomes into the system and the work flow
- Consults with the Project Specialist to identify appropriate methodologies to accomplish aims (PDSA, Lean Flow, etc.)
- Directs the team, leads team meetings.
- Partners with the Project Specialist to develop agendas, manage meetings, manage the project, and manage the change.
- Manages team performance, guides decision making, delegates responsibility for project work, acknowledges member contributions, works through conflicts, etc.
- Works closely with and meets regularly with Executive Sponsor and Project Specialist and Data Specialist.
- Ensures follow-through on agreed upon actions, timelines, milestones, and quality results.
- Seeks ad hoc members and outside information as required.
- Communicates and collaborates with stakeholders throughout the organization as needed to achieve aims and implementation of changes.
- Presents formal and informal project updates to appropriate councils as needed and as scheduled.
- Role exists until the improvement, change, implementation has become a part of regular work and handed off to the next site for the spread phase.

Project Specialist

- Partners with the Project Leader, Executive Sponsor, Data Specialist, and Team to facilitate processes to ensure that project aims are met.
- Assures that the work of the project is process-focused.
- Facilitates the development of aims, measures, scope, milestones, and timelines.
- Assists in facilitating the team so that meeting objectives and project outcomes are reached.
- Keeps groups customer-focused and data-driven.
- Provides facilitation and support the following areas:
 - Project management, team process performance, change management.
 - Improvement models and methodologies and tools (PDSA, Lean Flow, process flow charting, problem identification, force field analysis, cause and effect analysis, brainstorming, prioritization, etc.)
 - Teaching tools and methodologies.
 - Communicating with other Project teams to integrate work.

Data Specialist

- Partners with the Project Leader and Project Specialist to manage the data requirements for the project.
- Provides expertise in developing measures and measurement plans for the project.
- Develops processes to carry out the measurement plan for a project.
- Provides benchmarking, measurement, and data collection methods and tools.
- Aggregates, assesses, and displays data and information using statistical techniques and formats that promote meaningful data interpretation.
- Attends team meetings as needed to accomplish objectives.
- Communicates with others to integrate project work.
- Assists leadership with the monitoring and evaluation of project measures and outcomes.
- For the Control Plan, develops reports with triggers for use by process owners.

Team Member

- Represents the interests of patients, colleagues, specialty, department, site as a participant on the project team.
 - Communicates representative processes and views to project team
 - Communicates team information back to colleagues
 - Works with colleagues to implement improvements and changes
- Provides expertise in the project's focus area.
- Actively participates in project meetings and activities by:
 - Completing assignments.
 - Embracing change.
 - Implementing decisions.
 - Learning tools as needed.
 - Communicating with peers in accordance with ground rules and confidentiality.
 - Conveying thoughts and concerns openly.
 - Participating in the formation of and abiding by ground rules.

Clerical Support

- Assists leaders with meeting preparation and follow-up, room scheduling, agenda development, team scheduling, meeting minutes, email notices, copying and collating materials, etc.
- Assists team members, leaders, and PI Specialist with documentation such as timelines, worksheets, forms, tally sheets, and report presentations.
- Facilitates acquisition of materials and supplies as requested by the Leaders.