

# TEAM HUDDLE PROCESS

BEFORE THE HUDDLE

## All team members post and review PINS.

- Post PINS – PINS stands for Problems, Ideas, Needs or Suggestions that any team member can post on the Team Board using a sticky note.
- Allow enough time (about a week) for the PINS sit on the board so that people can think about them and even post comments/suggestions.

DURING THE HUDDLE

## All available team members attend the huddle and participate.

- Team Chair facilitates group discussion (reads PINS, guides sorting).
- As a group, you will address each of the PINS one-by-one following these five steps:

|   |  |
|---|--|
| <p><b>1. Clarify</b><br/>Read a PIN aloud and ask, "Is anything unclear?"</p>   | <ul style="list-style-type: none"> <li>• Work together to address any unanswered questions.</li> <li>• If no one who knows is present, set the PIN aside for the next huddle.</li> </ul>   |
| <p><b>2. Ask "why"?</b><br/>Seek to understand why it's important:</p>  | <ul style="list-style-type: none"> <li>• Why is it important now?</li> <li>• Who is impacted by it? (Who is it important to?)</li> <li>• How will fixing it make the work better?</li> </ul>   |
| <p><b>3. Determine priority</b><br/>Consider the team's existing workload and prioritize according to urgency and capacity:</p> | <ol style="list-style-type: none"> <li>1. Locus of control: Is it within, shared, or outside team control?</li> <li>2. Urgency – is this a crisis, barrier to daily work/progress, or less urgent?</li> <li>3. Time/Resources – do we have the personnel, budget, and or technology required to be successful now? (If not, when will we acquire them?)</li> <li>4. If the team determines this PIN cannot be addressed at this time, set it aside as "on hold" and revisit another time.</li> </ol> |
| <p><b>4. Sort by problem type</b><br/>As a team, sort the PINS by problem type</p>  | <p><b>Level 1:</b> Just Do It – simple and easy to solve.<br/> <b>Level 2:</b> PDSA – can be solved using basic improvement cycles.<br/> <b>Level 3:</b> Complex – unclear solution, will require resources/time.<br/> <b>Level 4:</b> Innovation – unknown solution, will require research.</p>   |
| <p><b>5. Assign</b><br/>As a group, identify someone to lead this PINS' resolution:</p>   | <ul style="list-style-type: none"> <li>• This individual will prepare a work plan according to PIN type.</li> <li>• They will lead the resolution process for this PIN.</li> <li>• They will provide progress updates at weekly huddle on this PIN.</li> </ul>   |

AFTER THE HUDDLE

## Team Chair submits PINS into SG Web App.

- At the conclusion of each Team Huddle, Team Chairs enter the PINS into the shared governance web app. Team Chairs are responsible to advance PINS to other councils for review/advancement.
- Follow-up with any team members who were not present to weigh in.
- Write any updates as they come in onto the Team Board.

# TEAM HUDDLE PROCESS

## Sorting PINS according to Problem Type – “How do we know what goes where?”

Use the following questions to help the team determine where/how to sort the PINS:

|   | Level 1<br>Just Do It | Level 2<br>PDSA | Level 3*:<br>Complex | Level 4*:<br>Innovation |
|---|-----------------------|-----------------|----------------------|-------------------------|
| Is there a clear solution to the PIN?   | •                     |                 |                      |                         |
| If a change is made, can it be easily undone if it didn't result in improvement?        | •                     |                 |                      |                         |
| Can the change be made in a few days?   | •                     |                 |                      |                         |
| Do you know what is causing the problem, idea, need or suggestion?                      | •                     |                 |                      |                         |
| Does the change impact only one or a few members of the team?                           | •                     |                 |                      |                         |
| Do you just want to make a process better, and need before/after data?                  |                       | •               |                      |                         |
| Does making the change require approval from multiple people?                           |                       | •               | •                    |                         |
| Do you need data before you make a change?  |                       | •               | •                    |                         |
| Should you do a test/pilot before making the change permanent?                          |                       | •               | •                    |                         |
| Can you make the change using known methods? (Protocols, policies, standard work, etc.) |                       | •               | •                    |                         |
| Does the change impact other departments and will it require their support?             |                       | •               | •                    |                         |
| Should you investigate what is causing the problem before making a change?              |                       |                 | •                    | •                       |
| Will the solution require conducting a research project?                                |                       |                 |                      | •                       |
| Does the change require innovative thinking, or something not done before?              |                       |                 |                      | •                       |

\* The SG Web App automatically notifies Mentor Councils of PINS that fall into Levels 3 & 4.