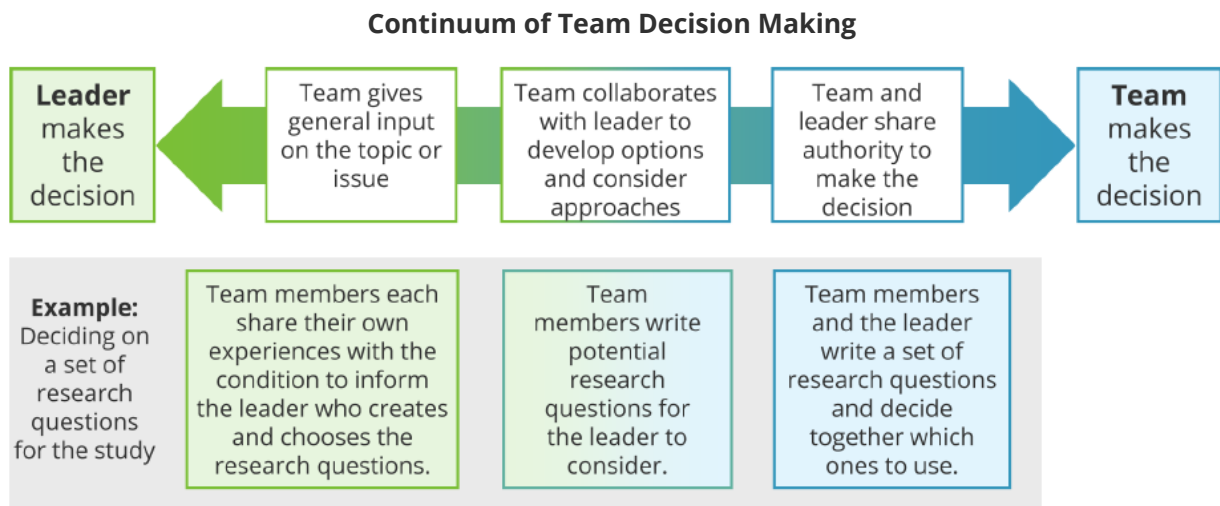


SECTION: *WORKING AS A TEAM*

Learning Area: *Leading and Contributing to Team Decisions*

► Making Decisions as a Multi-Stakeholder Team

Every patient-centered outcomes research (PCOR) study involves hundreds of decisions. Working together as a team to make decisions ensures that decisions reflect the perspectives and experiences of multiple stakeholders, which can help teams conduct the study effectively and find relevant results. Team decisions take place along a continuum (see the figure below).



With some of the decisions that the team needs to make, the leader may not be the principal investigator of the study. Rather, the leader may be anyone on the team taking leadership on a specific study task or the leader of a specific subcommittee.

Teams should work together to determine the appropriate level of stakeholder involvement for each study decision. This collaboration will give all team members clear expectations about how the team will make decisions throughout the study. When the leader makes the decision after input or collaboration, the leader should explain the decision and factors that went into it.

► The Heart of All Decision Making: Productive Discussion

Productive discussion is central to the decision-making process. Productive discussion occurs when:

- Everyone affected by the decision is part of the discussion, either in person or virtually.
- Everyone has enough information to take part in the discussion.
- Everyone's thoughts and opinions are welcome and heard, even if they differ.

Productive discussion also includes a process to help the team decide. Multiple processes exist to help teams structure their discussions. Some processes are simple, such as creating a meeting agenda, while others are more complex.

► **Technical Decisions and Values**

Many decisions in a PCOR study appear to be solely technical decisions that can only be addressed by team members who are fully trained in research methods. For example, the team may need to decide on the best statistical test to analyze the data. But these types of decisions also involve deeply held values that need to be discussed by stakeholders and researchers. For example, discussions about whether to randomly assign study participants to a treatment may lead to discussions about balancing the value of what is considered scientifically valid versus what is fair or equitable. Some team members may place greater value on the scientific validity of a randomized controlled trial (RCT), while others may value equal access to a specific treatment. These types of decisions may require additional time and discussion to learn about other team members' perspectives and reach consensus.

► **Resources on Team Decisions**

The following provide information and resources on important aspects of using productive team discussions to make decisions.

- **[Leading and contributing to productive meetings](#)**. Team meetings need structure and planning to ensure that discussions are productive. Productive meetings can also increase team member satisfaction.
- **[Team-driven decision models and processes](#)**. Using a team-driven approach to making decisions can help teams consider multiple options and perspectives and find agreement in an organized and efficient way.
- **[Building synergy through productive disagreement](#)**. Productive disagreement among team members can help teams integrate multiple perspectives in the decision-making process. The result is team synergy, where decisions made by the entire team are stronger than those made by any one member.

Leading and Contributing to Productive Meetings

Meetings are an effective way for teams to share information, brainstorm ideas, solve problems, make decisions, develop plans, and identify or mitigate risks to a study. Meetings can also help team members understand how their role relates to and depends on other members' roles. The following information can help your team plan each meeting and increase meeting success.

► Who Should be at the Meeting?

All team members who are involved in a specific task should be at meetings related to that task. The leader or leaders and those attending the meeting should understand why they are at the meeting and what they are expected to contribute to the meeting. Having team members attend a meeting to discuss tasks that do not involve them is not an effective use of their time and may weaken their interest. On the other hand, not inviting team members who have a stake in the meeting's outcome may diminish trust and lead to a missed opportunity to involve stakeholders.

► When and for How Long Should We Meet?

Teams should meet regularly (e.g., weekly or monthly), even if the meetings are brief. Meeting regularly keeps team members informed and involved. However, it is important that everyone attending any meeting understands why they are there and how the meeting topics relate to their work on the study.

Meetings that last longer than two hours can be challenging for everyone on the team, especially if the meetings are held virtually. If several tasks or items need to be discussed, scheduling breaks or holding shorter and more topic-focused meetings may be a better option. The person planning the meeting should be aware of how much can be accomplished in a reasonable amount of time and set the agenda accordingly.

Meeting leaders and participants can contribute to meeting success including virtual meetings.

► How Can Leaders and Participants Contribute to Meeting Success?

Both meeting leaders and participants can help ensure that meetings are productive and satisfying.

Leaders should:

- Have a clear reason to meet.
- Send an agenda and any materials that require review before the meeting.
- Clearly communicate the intended outcomes of the meeting.
- Discuss adjustments to the agenda as a team (e.g., if an item needs more discussion than planned).
- Test meeting technology to ensure that it is working prior to the meeting start time.
- Ensure that participants can access and use the meeting technology.
- Ensure that all participants have opportunities to contribute to the discussion.

Participants should:

- Prepare for the meeting by reviewing the agenda and materials.
- Remain focused during the meeting (e.g., avoid multi-tasking).
- Add value to the meeting through relevant comments, questions, and suggestions.

► Meeting Virtually

Many PCOR teams have members who can't meet in person. Teams across the country are learning ways to maintain engagement and team cohesion virtually. The key to virtual meetings is to ensure that everyone has a way to connect as fully as possible, including being able to see and be seen by the rest of the team and to be actively involved in the discussion. Below are several considerations to help leaders and organizers make the most of a virtual meeting.

Technology:

- Choose technology that can be accessed on a variety of mobile and computer devices.
- Choose technology that can be used by everyone on the team. It may be necessary to have options for team members who do not have access to high-speed internet.
- Take the time to train everyone on the meeting technology.
- Be prepared to solve participants' problems with the meeting technology.
- Make sure that the budget includes stipends to cover the costs of stakeholders' devices, internet access, and data plans.

Interaction:

- Make an extra effort to involve all members on virtual platforms.
- Provide opportunities for team members who want to contribute but who may not feel comfortable or able to speak up in a meeting (e.g., email, chat, polls, or text).
- Ask someone who is trained in virtual meeting technology to help plan meetings and operate the software during meetings.

Team-Driven Decision Models and Processes

► What Critical Elements are Needed When Teams Make Decisions?

When making decisions together, team members may have different ideas about what is being decided, what each decision entails, and what is influencing the decision. Sometimes teams may need to talk about the decision they are making before they begin. Making sure that everyone has a shared understanding of the following elements—at the start of a discussion—can improve team productivity:

- **Type of decision.** Understanding what kind of decision needs to be made can inform the method of decision making and give team members important background information. Most decisions fall into one of several categories:
 - *Course of action:* For example, the team needs to decide how they will collect data.
 - *Intellectual agreement:* For example, the team needs to decide how they will define a concept.
 - *Problem solving:* For example, the team needs to decide how they will address a specific challenge.
- **Context.** It may be important for team members to consider why a decision must be made at a certain time or how the decision affects the study as a whole. For example, coming to a shared understanding of the events that led up to a decision can help team members when considering multiple options.
- **Requirements.** Factors such as cost, time, laws, policies, and other requirements that cannot be changed may influence decisions. For example, a limited budget or set timeline may affect the options the team considers. Knowing these constraints up front ensures that the team considers only those options that are valid.
- **Guiding values and principles.** Teams may wish to identify the values and principles that are important to them in decision making. For example, the team may decide that any option they choose should reflect the team's principle of reducing burden on study participants. Teams should discuss their values soon after the team is created and review those values when making decisions.
- **Option details.** Team members should have a common understanding of each option being considered. Consider sharing background information about each option with all team members. To fully inform discussions, you may want to bring in outside experts to discuss complex or technical options with the team.

► Why Follow a Process?

Using a process for team discussions keeps everyone focused on getting to a decision. The following section presents the steps in a standard discussion process.

- **Set a clear goal.** All team members should be clear about the topic of the discussion and the desired outcome. The most common outcomes include:
 - *Shared knowledge:* Everyone on the team will have the same knowledge about the topic or project.
 - *Analysis:* The team will understand the root cause and/or impact of an issue, challenge, problem, or barrier.
 - *Decision:* The group will arrive at a decision or reach agreement about future action.

- **Make sure everyone on the team has access to the same background information.** The first part of every team discussion should focus on the open exchange of relevant information between team members, resulting in a shared understanding of the background, context, and details of the topic.
- **Create a process for sharing opinions.** Many group discussions allow time for members to express their perspectives, opinions, or ideas. However, it is important that this part of the discussion be focused on the outcome.
- **Move to agreements and actions.** A productive discussion should lead to the team making specific agreements and a list of actions the team will take, including next steps.

► An Example of a Team Discussion to Decide on Next Steps in Data Collection

A team working on a trial involving three ways for patients to recover after knee surgery is meeting to discuss the results of its first data collection effort, a six-month follow-up survey of 3,500 patients. The team agrees to a goal for the meeting, which is to gather feedback on the results of the first round of data collection.

The meeting starts with some background information about the survey, including how the team decided to administer it and why they collected the first set of data at six months. Members of the team then report on the survey collection, the number of responses, and the characteristics of the respondents.

Both researchers and stakeholders ask questions to clarify and deepen their understanding of the first round of data collection. The team leader asks the team to share their reactions to the information presented and any suggestions for improving, increasing, or maintaining the number of responses for the one-year survey collection.

Following that discussion, the team leader identifies areas of agreement, any potential future topics for discussion, and any next steps to be taken by the team or subcommittees.

► Discussion Processes for Specific Decision-Making Goals

Some decisions may require more complex discussion processes. The tables below summarize four discussion processes that every team should know how to use.

Brainstorming	
What:	A simple process to generate a list of potential actions from the team to solve a problem or advance a goal.
Example:	A team needs to create a list of ways to recruit participants for the study. The problem is getting people to participate in the study. The team will brainstorm to create a list of potential recruitment strategies (actions) that the team can develop into specific options.
When:	Complete this activity after all team members understand the problem and all relevant context that could inform ideas about how to solve the problem.
Why:	<ul style="list-style-type: none"> • To encourage creative thinking among the group. • To generate as many ideas as possible. • To build off each other's ideas.
Do not use if:	<ul style="list-style-type: none"> • No action needs to be taken. (Brainstorming works best to generate a list of concrete actions.) • People are not comfortable sharing ideas because they are afraid that they will be corrected by other team members.

Brainstorming

What else:	Brainstorming can be combined with other tools, as it only generates a list of potential actions; these potential actions then need to be developed into decision options using other methods.
How:	What Is Brainstorming? (Interactive Design Foundation) Your Team Is Brainstorming All Wrong (Harvard Business Review)

Devil's Advocate

What:	Team members question, debate, or find potential problems with the options being considered.
Example:	A team is considering the use of surveys to collect self-reported data from study participants, but not everyone agrees on this approach. The team has a discussion to fully debate the opposing options. Some team members argue for an option or approach while other team members argue against it.
When:	Use this approach when the group experiences groupthink (or when the entire team focuses on a single idea and loses the ability to think beyond it), or when disagreement is not being openly expressed by team members.
Why:	<ul style="list-style-type: none"> To find hidden problems or issues with a solution or course of action. To ensure everyone has voiced their opinion.
Do not use if:	<ul style="list-style-type: none"> No alternative solutions are available. The team has an unresolved personal conflict between members rather than opposing viewpoints on an approach.
What else:	<ul style="list-style-type: none"> This process works best when team members take a position for and against an option, or they play the role of devil's advocate. This process can make disagreement less personal. Be sure to "de-role" people at the end of the discussion so team members do not carry that identify forward.
How:	<ul style="list-style-type: none"> Devil's Advocacy and Dialectical Inquiry: Antidotes to Groupthink (International Journal of Scholarly Academic Intellectual Diversity)

Nominal Group Technique

What:	Team members generate, discuss, and vote on options to rank and/or decide among them. This process allows anyone on the team to advocate for an item that does not have enough votes to move forward before the team votes again. This approach also allows team members to reconsider their original vote. Voting continues until team members reach agreement on the option(s).
Example:	A team is deciding where to recruit patients for their study. They must develop a list of recruitment site options and then narrow down the list to three options to stay within budget.
When:	Use this approach when diverse perspectives on the team are likely to result in a broad range of options, which may make it difficult for the team to decide on an option.
Why:	<ul style="list-style-type: none"> To make sure everyone fully understands each option and has a voice in making the decision. If the team wants to use voting to arrive at a decision, the nominal group technique may offer the best process.

Nominal Group Technique

Do not use if:	<ul style="list-style-type: none"> Everyone cannot be present for the discussion, in person or virtually. The team is unable to devote enough time to complete the entire process within one or several meetings. The facilitator is unfamiliar with the process or is seen by others as having a clear interest in the outcome.
What else:	<ul style="list-style-type: none"> Nominal group technique may seem daunting, but it is simple to execute and most participants follow along. It is especially important that time is given for every team member to fully understand each option and to have their questions answered (without debate) before voting. The results of voting should be shared so that everyone can see which options have the most support and where the team is divided.
How:	<ul style="list-style-type: none"> Gaining Consensus Among Stakeholders Through the Nominal Group Technique (Centers for Disease Control and Prevention)

Delphi Method

What:	An approach to reaching consensus by using experts who provide information and advice on the options, followed by the team completing rounds of surveys to prioritize the options.
Example:	The team needs to decide what interventions and comparators should be studied. The team brings in patients and expert doctors to provide information and perspective on each potential intervention.
When:	This approach is often used for complex decisions with options that are best generated or informed by experts.
Why:	<ul style="list-style-type: none"> The decision is difficult, requires more insight on options than most members can provide, and requires careful consideration of the issues rather than a simple vote. Using surveys and voting to reach agreement is impersonal and avoids conflict when team members share potentially opposing views.
Do not use if:	<ul style="list-style-type: none"> The team is unable to devote enough time to complete the entire process over several meetings. The team does not have the administrative support to do the planning and between-meeting activities associated with the process.
What else:	<ul style="list-style-type: none"> Several variations on this method can be used to simplify it and make it less daunting. Experts are not only individuals with credentials. The Delphi method also considers individuals with established experience on a topic to be experts. The Delphi method is used often in science because it lets teams be fully informed and use their own values and perspectives (via short surveys) to rank options in multiple rounds. Although the Delphi method can include discussion, it is not a major component; teams can use this method to make decisions without any interaction or debate and work strictly from survey results. However, using this method in this manner may make the process feel impersonal, which can affect team cohesion.
How:	<ul style="list-style-type: none"> The Delphi Technique: Making Sense of Consensus (Practical Assessment, Research and Evaluation)

► Common Elements Across Approaches

Regardless of the approach used, decision-making discussions generally involve several steps. At each step in this process, it is important that all voices are heard and that everyone has a chance to contribute (see Inclusion: The Starting Point for Effective Teams in the [Engaging Stakeholders](#) section of the website). The steps are as follows:

- Introduce and clarify the issue(s) to be decided.
- Collect and write down team members' concerns and ideas for solving the problem.
- Discuss and debate the ideas, including their benefits and harms.
- Identify proposals, weave together the best elements of each idea, and address concerns.
- Discuss and revise the proposals to make them more acceptable to the full team.
- Check in with team members to identify blocks, stand-asides, reservations, and agreement.
 - **Blocks** are fundamental disagreements with the core elements of a proposal.
 - **Stand-asides** cannot support a proposal for a certain reason but do not want to stop the team from moving ahead.
 - **Reservations** are doubts about some aspects of the proposal.
 - **Agreement** is support and willingness to implement a proposal.

The team has reached agreement when few stand-asides or reservations are present, and no blocks are present.

Building Synergy Through Productive Disagreement

► What is Synergy?

Synergy occurs when two or more people work together to create something that is more than what each individual member could achieve on their own. Synergy can be positive or negative. For example, a team can work together to create a solution that no individual would have thought of on his or her own. On the other hand, synergy can lead to groupthink, where the entire team focuses on a single idea and loses the ability to think beyond it.

► Productive Disagreement Versus Personal Conflict

Productive disagreement occurs when members of a team are comfortable enough to openly disagree about ideas or content, such as the data, conclusions, or future actions of a study. Productive disagreement focuses on differences between team member views on a subject and allows team members to work together to find effective solutions.

Productive disagreement is different from personal conflict where someone disagrees with the person rather than their *ideas* (see Solving Challenges and Barriers to Teamwork in the [Working As A Team](#) section of the website). When this occurs, our general impressions—good or bad—about another team member can influence our opinion of their ideas. Rather than focusing on the team member's idea, someone makes a personal judgement about the character or competence of the person offering the idea. Personal conflict involves insults and accusations rather than reasons for disagreement and an alternate view. Often the insults and accusations may be hidden in comments that may sound objective or even friendly but are meant to comment on someone's character or ability.

Each team member must commit to having productive disagreements and to not making personal judgments when commenting on another person's ideas. Productive disagreement may be part of the norms that the team establishes (see Best Practices in Multi-Stakeholder Team Science in the [Working As A Team](#) section of the website). However, this norm is only as strong as each team member's commitment to separating their ideas from their judgments about others.

► How Can Teams Promote Productive Disagreement?

To promote productive disagreement, teams should:

- Have a shared understanding of productive disagreement and personal conflict, including how they differ.
- Establish productive disagreement as a team norm and hold each team member accountable for not personalizing disagreement.
- Embrace differences in style, background, and perspective among team members.
- Consider others' ideas without judgment.
- Try not to hear disagreement with an idea as a personal attack.
- Negotiate personal conflict separately from team discussions and decisions.