Section A
Why should teams take the time to reflect?
'At the most basic level, establishing and maintaining high-functioning teams takes work'.
Mitchell et al 2012

Taking the time to reflect on what works, and why, is one of the most important factors in creating an effective team. And yet, people tend to reflect very little on what makes their team work well (West and Lyobovnikova 2013). Instead, the focus is often on the outcomes achieved – whether it’s money saved, or the number of patients treated.

Much of what we say is necessary for teams to collaborate might seem obvious. You’ve probably heard it all before. But the truth is, most teams aren’t working effectively. They aren’t paying enough attention to the factors that matter to teamwork. And teams that draw in different professional groups, such as finance and clinical staff, with their different cultures, perceptions and hierarchies, need to pay greater attention to the factors that make teams work.

Joint working isn’t easy, and this tool helps you identify the elements that you need to work effectively across professional boundaries.
Dream teams

Successful teams aren’t simply the result of putting the right people together.

Successful teams take the time to stop and review how they work and what they achieve. They ask themselves what they could change and do better.

Team reflexivity is a structured, honest, open conversation designed to gather the views of all members on how well they are doing as a team. It’s not a test, nor an appraisal of any one individual in the team. Rather, it’s an opportunity to stop and reflect, and to learn as a team.

Team reflexivity is a powerful tool for improvement. But reflexivity often comes last on the list of a team’s priorities. It’s seen as ‘a nice to have if only we had time’.

We want to encourage teams made up of finance and clinical staff to think about the way they work as a team.
The benefits of team reflexivity are clear in research and in practice.
Great teams spend time reflecting on how they work

A high performing team is good at thinking about the way it achieves its objectives as well as the way it supports team members and functions as a team.

**Task reflexivity**
Team members actively focus on their objectives, and review how to achieve them.

**Social reflexivity**
Team members review the way they support each other, look at how conflicts are resolved and how members feel as part of the team.
Cross-team partnerships need strengthening
Strong partnerships are not the norm across the NHS

• Only 23% of NHS trusts reported that joined up, collaborative working was the norm across all clinical specialities/directorates (Department of Health 2013).

• ‘Nearly three quarters of clinicians feel they are rarely or never involved in financial decisions affecting their whole organisations, and over half do not believe they are involved in financial decisions that affect just their service or team’ (Association of Medical Royal Colleges and the NHS Confederation 2014).

• In 2007, the Audit Commission concluded that: ‘clinicians and finance professionals do not simply use different jargon; their view of healthcare, finance and each other is often profoundly different.’ (Audit Commission 2007). Over seven years later, we found limited evidence that finance and clinical teams know how to build a shared, mutual understanding of how to work together to improve patient care.
Patients need clinical and finance staff to find new ways to work together

- **There is no new money.** Finance and clinical staff need to collaborate to improve the productivity, quality and safety of healthcare.

- **Every clinical decision is a financial decision.** Finance and clinical professionals need to share responsibility for deciding priorities and allocating resources. Finance and clinical staff need to collaborate and not view themselves as being on opposing teams.

- **There is mounting evidence of the quality and productivity improvements** that result when clinical and finance staff collaborate. Their joint efforts can highlight inconsistencies in service delivery, reduce waste, improve patient safety and identify new pathways of care (Academy of Medical Royal Colleges 2014, Department of Health 2013).

‘Just keep reminding people of the benefits of what we’re doing; this closer working, the benefits of working closer with our clinicians etc and most importantly the better patient care we’re giving.’ Pilot site, CIPFA 2015.
We’ve drawn on research across disciplines to identify what determines effective teams, particularly ones made up of diverse professional members. We have identified **seven** factors that are all known to improve team effectiveness and as a result, are key to the delivery of high quality and efficient care.

- These seven criteria might seem obvious.
- But they need your regular attention.
- They can’t be ignored if you want strong teamwork across professional boundaries.

Take a look at the research summary to learn more about the conceptual framework and the latest research evidence. Find out why we chose the seven factors for successful teamwork across functions.