



Improvement Coach Professional Development Program

Getting Started

January 2017



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Overview

Health care, as well as other service organizations, use both internal and external advisors to provide improvement expertise and to coach and facilitate organizational improvement activities. The people in these positions are often called quality coaches, quality improvement specialists, quality facilitators, and black belts as examples. To achieve organizational success, these individuals need to be on a personal learning journey to develop and enhance their knowledge and skills of the art and science of improvement. The Institute for Healthcare Improvement's (IHI) Improvement Coach Program provides one such source for this learning.

The IHI Improvement Coach Professional Development Program is a 12-week journey to further develop your improvement knowledge and skill so you can coach and facilitate improvement teams, as well as support the implementation of improvement strategies throughout your organization. The expectation is that you will not necessarily change your current role and become a full-time improvement professional. Rather, this course will build your knowledge and skills in the application of the science of improvement that will, in turn, complement your specific area of specialization. To gain the most out of this course, it is highly recommended that you have knowledge of and previous experience applying improvement concepts, methods, and tools, but need more training in coaching and facilitating improvement teams.

This program is designed to help you:

- Understand the science of improvement and use the Model for Improvement as a roadmap for improvement projects
- Coach improvement teams on how to develop, test, and implement changes including identifying high-leverage change ideas and testing them using PDSA cycles
- Become skilled in how to use data for improvement, including how to use run charts, and other key quality improvement tools
- Build skills in team facilitation, communication, decision making, and understanding team culture
- Apply just-in-time teaching of improvement skills to team members in order to advance the team's work
- Leave with a specific plan for how you will continue coaching your team and prepare yourself to coach subsequent teams
- Learn concepts of implementation, spread, and scale-up

You will organize your learning in this program around a specific team and the improvement project this team is pursuing. The team's project and application of the coaching methods to its work are central to the program. Therefore, each participant must have an improvement team to coach, and the team must have a project, preferably new or just beginning, in order to participate.

The 12-week program includes one preparatory webinar, a three-day workshop followed by three 3-hour webinars, a second three-day workshop, and a concluding webinar. The sessions will combine lectures with frequent interactive group exercises to support key concepts and tools. Participants immediately apply what they have learned to their own improvement team. By the end

of the course, participants can expect to have a strong team and project underway that will show meaningful results in the months to come.

This getting started packet is designed to help you get maximum return on your involvement in the program. It includes program expectations, background readings, a guide to selecting the team that you will work with during the course, three preparatory exercises for workshop 1, and important information about course timing, procedures, and logistics. If you have additional questions, please contact Mark Bradshaw at mbradshaw@ihi.org.

Expectations for Participation

- A team (with typically three to eight members) with an improvement project to coach - essential for successful learning!
- Knowledge of and previous experience applying quality improvement concepts, methods, and tools.
- Ready to take the next step and coach improvement teams.
- Conduct the preparatory exercises (instructions below) and submit the following by January 25, 2017:
 - Team profile
 - MUSIQ calculator with score
 - Self-assessment
- Participate in the two three-day, in-person workshops and five webinars (see following section for dates and times). Please mark your calendars now to be able to participate in all activities.
- Commit to working with your team on their project in preparation for the first workshop and immediately following the first workshop and throughout the program - we learn by doing!
- Willingness to share your work and coaching with the rest of the participants - all teach, all learn.

This program is designed for those with a basic foundation in and experience applying quality improvement concepts, methods, and tools, and are looking to advance their skills particularly around coaching and facilitating improvement teams. If you do not have this background or would like a refresher, please visit www.IHI.org/QualitySkills for an overview of the key elements of the Science of Improvement. Here you will find a link that will provide free access to the IHI Open School's online course *QI 102: How to Improve with the Model for Improvement*. You will also find a growing collection of whiteboard videos from Dr. Robert Lloyd, IHI Vice President, explaining the basics of improvement, including Deming's System of Profound Knowledge, the Model for Improvement, and PDSA cycles.

Program Schedule

Program Activity	Location	Date	Time
Virtual Workshop 1: Getting Started	Webinar	January 12, 2017	9:00 AM-10:30 AM Pacific (12:00 PM-1:30 PM Eastern)

Workshop 1	In-person (San Francisco, CA)	January 30-February 1, 2017	Pacific time: Day 1: 8:00 AM-5:00 PM Day 2: 8:00 AM-5:00 PM Day 3: 8:00 AM-4:00 PM
Virtual Workshop 2	Webinar	February 16, 2017	9:00 AM-12:00 PM Pacific (12:00 PM-3:00 PM Eastern)
Virtual Workshop 3	Webinar	February 22, 2017	9:00 AM-12:00 PM Pacific (12:00 PM-3:00 PM Eastern)
Virtual Workshop 4	Webinar	March 2, 2017	9:00 AM-12:00 PM Pacific (12:00 PM-3:00 PM Eastern)
Workshop 2	In-person (San Francisco, CA)	March 13-15, 2017	Pacific time: Day 1: 8:00 AM-5:00 PM Day 2: 8:00 AM-5:00 PM Day 3: 8:00 AM-4:00 PM
Virtual Workshop 5: Graduation	Webinar	April 6, 2017	9:00 AM-10:30 AM Pacific (12:00 PM-1:30 PM Eastern)

Readings

Several background articles are posted on IHI.org for your reference - see Accessing Program Materials below. In preparation for this program, we highly recommended reviewing the following prior to the first workshop:

- Berwick, DM. A primer on leading the improvement of systems. *BMJ Quality & Safety*. 1996; 312 (7 031): 619-22.
- Kaplan HC, Provost LP, Froehle CM, Margolis PA. The Model for Understanding Success in Quality (MUSIQ): Building a theory of context in healthcare quality improvement. *BMJ Quality & Safety Online First*. 10 August 2011; <http://group.bmj.com>.
- Perla RJ, Provost LP, Murray SK. The run chart: A simple analytical tool for learning from variation in healthcare processes. *BMJ Quality & Safety*. 2011; Jan; 20(1): 46-51.

Additional resource (**Please note: A copy of this book will be provided to all program participants.**)

- Langley J, Moen R, Nolan T, Norman C, Provost L. *The Improvement Guide: A Practical Approach to Enhancing Organizational Performance*. Second Edition. San Francisco, CA: Jossey-Bass; 2009.

Accessing Program Materials

To access the materials for this program, including copies of the recommended readings, please follow the steps below.

1. Visit www.ihl.org.
2. Click on the “Login/Register” link at the top of the page. *If you are already logged in, continue to step 4.*
3. Login using the email address and password that you used to create your IHI User Profile.
4. When you have successfully logged in, click the “My IHI” link at the top of the page.
5. Click “My Enrollments & Certificates” on the left-hand side of the screen.
6. Find the section titled “Improvement Coach Program: January-March 2017” and click on the “Materials/Handouts” link.

All currently available presentations and resources will be available on this page. Some presentations may not be available until the program concludes. Please note, faculty may edit or update their presentations at their discretion. We will continually update this page as we receive new and updated presentations and resources.

In order to decrease our impact on the environment, we will *not* be printing copies of the slides for this program. Instead, copies of all presentations and materials are available online prior to, during, and following the sessions. Thankyou for helping us stay green!

Preparing for the Program

There are three activities, outlined below, that we ask you to conduct in preparation for the program:

- Prepare a team profile
- Calculate the team's MUSIQ score
- Take the self-assessment

Please complete and submit these three items - team profile, MUSIQ calculator with score, and self-assessment - by January 25, 2017. The team profile will be submitted using an online form (see instructions below), and the MUSIQ calculator and self-assessment can be sent to Mark Bradshaw at mbradshaw@ihi.org.

Additionally, data is critical to improvement because measurement is critical to improvement; therefore, we ask that you bring data from your team, if possible, to use at the first workshop. If you do not have access to your team's data at this time, we will provide example data for you to use during exercises. Most often participants bring data in Excel, but data on paper or in other formats is fine. Data should be grouped by time - e.g., hour, day, week, or month; try to avoid bringing data in larger time increments (e.g., quarterly or annual). Bring as much data as you can including baseline if possible.

Prepare a Team Profile

Estimated Duration	Who	Why
30 minutes	Coach and Team (or Team Leader)	To determine which team you will coach for the program, gather a basic profile on the team as a starting point, and orient the program faculty to your team and its project

Select a Team to Support:

An Improvement Coach may be asked to support more than one team at a time. In the program, therefore, we ask that you:

- Think about all the teams you are currently supporting or expect to be supporting in the next six months. It might be helpful to list these out.
- From these teams you are or will be supporting, select ONE that will serve as your showcase team for the program. Remember that the objective of the program is to help you apply and

practice your coaching skills to team situations. You are not expected to produce significant results with the team you select, but to assist the team in becoming a highly effective team, who is, in turn, responsible for the project's results.

- When selecting your team, it may be helpful to consider the teams' projects and choose one with a project that can benefit from coaching within this timeframe. Appendix A contains project guidance that may be helpful to consider when selecting your team.
- Ideally, your selected team is either new or just beginning; teams that are well underway and deeply into their work may not make a good learning opportunity for the purposes of this program.
- Potential improvement team members should be eager to learn and, like you, will need dedicated time to work on the project. The team will need to have authority to make changes without approval. Team members may include suppliers to the process, those who work in the process, customers of the process, and other stakeholders. The process owner should be able and willing to be the team leader and work with you in and between team meetings.
- For the duration of the program, we estimate the following time commitment:
 - **Coaches:** Approximately four hours or more a week, when not in formal program activities, to work with the team and complete program assignments.
 - **Team members:** Between one and three hours per week for project work (e.g., participate in weekly team meeting, testing ideas between meetings, etc.)

Prepare a Team Profile:

Prior to workshop 1, please sit with the team members (or the team leader) of the team you selected and complete the Team Profile, which can be accessed [here](#). If you have any problems accessing this document, please contact Caitlin Littlefield at clittlefield@ihi.org.

Complete and submit your completed team profile via this online form by January 25, 2017.

Calculate the Team's MUSIQ Score

Estimated Duration	Who	Why
60-90 minutes	Coach and Team (or Team Leader)	To understand possible contextual factors affecting your team's improvement project so that you may explore how you might optimize or mitigate those factors over which the team has control or influence

Quality improvement efforts have become widespread in health care; however, there is significant variability in their success. Differences in *context* are thought to be responsible for some of the variability seen.

The Model for Understanding Success in Quality (MUSIQ) is a conceptual model that was developed for organizations and quality improvement researchers to understand and optimize *contextual* factors affecting the success of a quality improvement project.

In preparation for the first workshop, we ask that you:

- Read *The Model for Understanding Success in Quality (MUSIQ): Building a Theory of Context in Healthcare Quality Improvement*, included as a separate attachment.
- Calculate your MUSIQ score with your team (or at least with the team leader) using the MUSIC calculator, included as a separate attachment.
- **Email your completed MUSIQ calculator with score to Mark Bradshaw at mbradshaw@ihi.org by January 25, 2017.**

We will review and discuss your MUSIQ score at workshop 1. Additionally, we will ask that you complete this assessment again near the end of the program to see how your team has progressed.

Take the Self-Assessment

Estimated Duration	Who	Why
30 minutes	Coach	To help you gain a better understanding of where you stand personally with respect to your knowledge of and experience with the basic principles and tools of the science of improvement and how that progresses over the course of the program, and to help the program faculty adapt the program to the needs and experience of the participants

In preparation for this program, we ask that you complete a self-assessment designed to help you gain a better understanding of where you stand personally with respect to your knowledge of and experience with the basic principles and tools of the science of improvement. Additionally, the collective responses to this assessment help the program faculty to adapt the program to the needs and experience of the participants.

This self-assessment is divided into six skill categories, which have been adapted from *The Improvement Guide*¹, Chapter 2. These skills are referred to as the “Skills to Support Improvement” and serve as the foundation for much of what we teach in our improvement science programs.

We ask that you complete this self-assessment twice during the program. Your responses to the first administration prior to the first workshop will serve as a baseline. Your responses to the second administration at the end of the program will help you to gauge your individual growth and development, and will help us measure the progress of the program overall.

The place to start is to be honest with yourself and see how much you know about quality improvement concepts, methods, and tools. There are no right or wrong responses to the statements in this assessment, only opportunity for reflection and discussion.

The self-assessment is included as a separate attachment. **Please complete the first part as instructed prior to the first workshop, and email it to Mark Bradshaw at mbradshaw@ihi.org by January 25, 2017.**

Thank you in advance for taking the time to complete this self-assessment.

¹ Langley GL, Moen R, Nolan KM, Nolan TW, Norman CL, Provost LP. *The Improvement Guide: A Practical Approach to Enhancing Organizational Performance* (2nd Edition). San Francisco, California, USA: Jossey-Bass Publishers; 2009.

Optional Preparatory Activities

We have provided three *optional* exercises that you may wish to do with your team in preparation for the program. These include:

- Developing an Improvement Project Charter
- Creating a Driver Diagram
- Understanding the Process or Problem

You can access more information about these exercises at www.ihl.org - please see Accessing Program Materials above for instructions.

Appendix A: Project Guidance

For this interactive program to have maximum benefit, it is essential that you identify a team, ideally new or just beginning, with an improvement project on which to focus your learning. It may be helpful to consider a team's project when making your selection, and choose one with a project that can benefit from coaching within this timeframe. The project guidance below may be helpful to consider when selecting your team.

Guidelines for Selecting an Appropriate Project

For the purposes of this program, we suggest smaller scoped projects that can be used for learning during the program, will have a good chance of success, and produce results that will be seen as important to your organization. Ideally, the team will be able to test ideas and see results from those ideas within the 12 weeks of the program. Further details for project selection follow.

- The proposed project and anticipated results should be important and matter to the organization, which, because of the smaller scale of these projects, might be at the unit or department level to start. Ideally the project and results should be connected to strategic and business plans of your organization.
- The project is clearly:
 - A process to be improved (one process where you can identify the boundaries – start and end points) and this process should not be undergoing major changes already.
 - A problem that is clearly linked to an identifiable process.
- We suggest that the scope of the team's project allows it to be completed in three to six months and has a high probability of success. If the project idea is focused on a large, long-term improvement project, consider breaking it down into a smaller components and work on one component with an intermediate aim to allow you and the team to practice the methods and tools and see results.
- Key measures of success that connect directly to the goals for the project have been identified. Ideally, data can be collected daily (can be weekly if needed), for the measures. Availability of baseline data is recommended but not necessary.
- The project has a sponsor, that is, a leader with responsibility for the area under study, who agrees to actively provide guidance, routinely monitor project progress, and aggressively remove barriers.
- The systems, processes, products, or organizations where the anticipated changes must be made are within the control of the team or the leader supporting the project.

The following table may help you assess the projects of potential teams you may be thinking about working with for the Improvement Coach Program. Assess each team's project based on the criteria described and enter your score in the last column. The project with the highest score would likely be a good fit for you to coach during the Improvement Coach Program.

Criteria	Additional Details	Your Score (1 – 5)
		Note: A score of 5 indicates strong agreement with this criteria while a score of 1

		<i>indicates little to no agreement with this criteria.</i>
Availability of team	<ul style="list-style-type: none"> - Project team includes 3 to 5 people - Team able to meet frequently enough to apply learning - Leaders willing to give Improvement Coach dedicated time to work on project 	
Authority of team	<ul style="list-style-type: none"> - Team able to make changes without permission - Process owner able and willing to lead team 	
Willingness of team	<ul style="list-style-type: none"> - Team eager to learn and willing to participate - Process owner willing to work with Improvement Coach 	
Type of project	<ul style="list-style-type: none"> - Project is improvement of a process - Process is not already undergoing major change - Project is in its infancy or has not started yet - Data for process already exists 	
Scope of project	<ul style="list-style-type: none"> - Project could be completed over the course of 3 to 6 months - Project has a high likelihood of success - Key measures of success have already been defined 	
Energy and interest	<ul style="list-style-type: none"> - Improvement Coach finds project interesting and engaging - Organization finds project of benefit to overall strategy 	

Examples of appropriate projects:

- Improve a process that produces good results most of the time but occasionally results in errors or problems (e.g., testing new protocols for reducing errors).
- Identify a process that better matches and meets a patient or family need, even if patients or families have not expressly asked for it (e.g., test a process to better assess long-term care residents’ needs).
- Identify and improve processes, products, and services by making fundamental changes even though the output is currently not considered a problem, in order to deliver even better outcomes in the future.
- Improve a product, process, or service today, which will put you in a better competitive position (e.g., improve outcomes for patients with chronic conditions through self-management support that includes collaborative goal setting, action planning, and problem solving).
- Fix a recent or recurring problem that all agree needs to be fixed to put a process back (restore) to the level it was designed to perform or to exceed expected performance.

Project topics from previous Improvement Coach Program participants:

- Improve emergency department flow
- Improving emergency department care for patients with DVT/PE
- Emergency department utilization
- Reducing pressure ulcers; Visual cues for bedside staff in pediatric pressure ulcer prevention
- Improving follow-up post hospital stay

- Improving diabetes outcomes
- Increasing access to behavioral health
- Reducing the number of days to schedule an appointment for surgery
- Decreasing wait time for cancer patients seeking overnight lodging
- Patient centered design: Reducing paperwork for patients (and increasing patient and provider work flow and satisfaction)
- Improving adherence to new guidelines
- Reducing appointment "no-shows"
- Improving medical screening process; Increase screening rate for social needs in an ambulatory clinic
- Improving completion of a tobacco smoking history reminder in outpatient primary care
- Reducing resident falls
- Improving hydration on an elderly ward
- Increasing community resident attendance in fitness programs
- Increasing student asthma medications in school nurse's office
- Reducing parental complaints regarding homework
- Improving housing placements; Improving rapid re-housing

The following projects are NOT appropriate for this program:

- Develop a measurement or data collection system - such as a balanced scorecard, surveys, or core measures.
- Fix a transient problem or an emergency.
- Implement various types of inspection or reviews to prevent errors from reaching a customer.
- Improve employee compensation or rewards.
- Implement or improve a one-time or infrequent training or educational workshop.
- Any project where you expect an IT or training solution.
- Any project where you cannot answer the question, "How do I know a change is an improvement?"
- A project that is lacking leadership support or is outside the sponsor's control or influence.
- Huge ("solving world hunger") projects. Strategic issues, while worthy of work by their very nature, will require more than three to six months. Consider scaling down or partitioning these projects into a more manageable "chunk" (i.e., no more than four to eight major components).
- Politically charged issues are not a wise choice of projects for the Improvement Coach Professional Development program; they can easily get mired in conflict.