



Coaching Certification Program

National Quality Management
Program Guidance

Healthqal

UCSF

UCSF Institute for
Global Health Sciences



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Overview

The Coaching Certification Program

This coaching certification guidance is designed to support the national quality management program in establishing a process of certification using agreed upon standards and coaching competencies.

The guidance was developed by HEALTHQUAL/ UCSF Institute for Global Health Sciences through a network of quality improvement coaches from diverse clinical and administrative backgrounds. Participants represented a wide range of coaching and implementation experience across a variety of health care systems, including Haiti, Kenya, Namibia, Thailand, Uganda, US, Vietnam, and Zimbabwe. The guidance represents the collective knowledge and experience of these staff across national quality management programs, combined to create generic certification guidance and materials.

Use of the Guidance and Materials

This guidance can be used as a starting point and framework for those interested in strengthening coaching in their quality management program with a certification element.

The intention of establishing a network of certified QI coaches, is to increase the pool of competent improvement coaches for a national program by differentiating staff that actively coach as part of their role and possess standard coaching competencies from individuals that have attended training or meetings, but have not institutionalized the coaching role.

The tools provided are generic versions of materials developed and used within many of the coaching network countries. They are provided as examples which can be customized.

The Coaching Certification Guide

1. Introduction

Quality Improvement coaching is a key component of a national Quality Management Program, and/or imperative for the deployment of any large-scale improvement initiative. Coaching is the primary strategy through which the national Quality Management Program develops, enhances, and refines systems at site level to improve health care processes and patient outcomes.

Trained and certified quality improvement coaches help to build national capacity for quality improvement and quality management by assisting facilities with QI implementation and by extending the reach of the national program. Coaches are also integral to the facilitation of local sharing and peer learning by connecting providers around common challenges and successes identified during coaching interactions. Successful coaching helps to accelerate the spread of sustainable improvements and maximize resources for quality. To address sustainability issues with staff turnover, coaching competencies should also be integrated into job duties of staff supporting the national program, such as through implementing partner agencies and other technical working group (TWG) members, as appropriate.

Although many professionals possess skills that correspond to specific components required for QI coaches, many lack the full set of tools and knowledge to be considered fully competent QI coaches. To develop accountability for the process of QI coaching and to ensure the competency of staff assuming this role, certification is an important process that safeguards the integrity of the national program, assuring that goals and objectives are promoted with fidelity.

Through decades of work in the US and in low-and middle-income countries, HEALTHQUAL has identified key factors of successful coaching strategies that provide the foundation for the program.

These include:

- Establishing a systematic approach to each aspect of a national coaching program—selecting, training, implementing, and sustaining coaching
- Selecting coaches with knowledge of quality improvement theory and implementation experience
- Ongoing reinforcement of the coaching role through leadership support, simple tools, feedback and observable use of the information gained during coaching interactions

2. Purpose and Expectations

The coaching certification program aims to build and recognize a higher level of individual coaching capacity and to expand the team of skilled improvement coaches for the national quality management program.

At the facility level, the certified QI coach:

- Conducts regular ongoing coaching site visits or contacts (email, phone, WhatsApp, ZOOM) using QI and assists facility QI teams with implementing improvement efforts
- Helps facility providers understand and use performance measurement data to set priorities, understand system gaps, apply improvement interventions and measure results
- Develops recommendations to strengthen facility quality management programs by conducting annual quality management organizational assessments (OAs)
- Guides site teams to develop a quality management plan and workplan with clear action steps based on OA recommendations and data analysis

- Engages the facility team to fully document and share quality improvement experiences
- Guides site teams to engage consumers in their quality program
- Identifies QI training needs and plans, and delivers QI trainings to facility staff and new coaches on behalf of the national program

In addition to facility-level QI coaching, a national quality management program may designate improvement coaches at the regional, district or provincial levels depending on the various structures within the country. Their roles and responsibilities at other levels will then depend on the specific country's terms of reference for QI coaches.

The QI coach is also expected to provide guidance related to the quality of care and services within a regional jurisdiction or district, possibly shared among a group of coaches. Activities include those occurring among multiple providers, regional QI groups or learning networks, as well as coordination between government officials and providers.

At the regional, district or provincial level, the certified coach is expected to:

- Create shared learning opportunities between facilities and districts to enhance modeling and replication of best practices
- Support and plan a regional QI learning network
 - » Resources for regional groups were developed by HEALTHQUAL and updated by the National Quality Center (NQC) and can be adapted as desired
- Support facilitation of region-based QM didactic trainings
- Serve as a resource person to attend consultations on QM issues in the region
- Have access to regional data reports and work with regional officials to identify priorities for improvement within the jurisdiction

3. Basic Requirements for Certification

The coach must demonstrate competency in the following specific QI knowledge and applied skills to be considered for certification:

1. Basic knowledge of QI theory

- Complete the basic national QI training and demonstrate proficiency through post-test

training scores above the 75th percentile; or attend an internationally recognized formal QI training program (e.g., IHI Open School, IHI Improvement Advisor Course, NQC Quality tutorial, NQC Training of Trainers Program, NAHQ, ISQua, or other QI training courses to be agreed upon by the national program)

- Complete the basic national QI coaches training curriculum and demonstrate proficiency through post-test training scores above the 75th percentile; or attend acceptable equivalent to be agreed upon by the national program (e.g., NQC Training on Coaching Basics, NQC Training of Quality Leaders)

2. Basic individual experience as a coach

- Experience coaching at least one facility QI team through all steps of the improvement process resulting in a fully documented and completed QI project, a fully documented Organizational Assessment with recommendations, and associated performance measurement data reports. The national program will be responsible to assign an expert coach or member of the QM team to observe and assess these skills and monitor coaching performance over time

3. Understanding of consumer involvement in quality

- A full understanding of involving consumers in quality improvement activities, including how to engage consumers in priority setting and to participate in QI teams. Knowledge of recruitment methods, and training of both staff and consumers about consumer involvement should be evident, along with how to evaluate this aspect of the quality management program in accordance with the organizational assessment

4. Ability to use the various national program data reporting tools and analysis

- A full understanding of the national data reporting tools and platforms, ability to analyze and ensure harmonization of data reports. Coaches must be able to assist facilities in QI decision making based on analysis of all available data sources

5. Reporting

- The coach must be able to maintain a record of their coaching activities, including details about their interventions with the facilities based on national program expectations

4. Minimum Performance for Certification

Mechanisms to track coach performance will be country specific. The performance of the coach will be evaluated by the national program based on the expected outputs and outcomes of the assigned coaching activities. Performance indicators will be specified by the country team. For example:

At the end of the implementation period for the coaching certification process (6 months–1 year), the facilities assisted by the coach should have a functional Quality Committee, planned and executed QM plan, and at least one QI project demonstrating a certain level of improvement as defined by the national program.

- Complete the National QM Program’s coaching training curriculum. If the national program does not have a coaching curriculum in place, the national program can decide to substitute completion of an agreed upon equivalent program for QI Coaching
- Submit the first coaching plan within the next 3 weeks after training
- Submit a coaching report within the 72 hours after conducting a coaching visit
- Conduct the OA in assigned facilities; the first OA should be conducted within 2 weeks after training
- Conduct at least 6 coaching/mentoring contacts —either in person or remotely via ZOOM per facility (at least a visit every 2 months)
- Achieve the program’s minimum performance level on all required knowledge and skills tests

Coaching functions should be observed by expert coaches and representatives of the national QM team to assess the coach’s skills against standardized criteria and to ensure that the coach can apply knowledge of QI in practice.

1. Observe and assess the coach’s ability to:

- Conduct an organizational assessment, give feedback and recommendations based on results
- Interpret performance data and identify improvement opportunities

- Complete an improvement project memo and support the facility team in documenting and sharing QI successes and lessons learned
- Develop and implement a schedule for coaching activities
- Develop a coaching plan specific to one facility that incorporates a work-plan with action steps
- Facilitate QI meetings and team discussions
- Apply basic QI tools* (list below) in practice that reflect skill with process mapping and root cause analysis

*Coaches should exhibit experience with each of these tools and demonstrate their ability to use them as part of the coaching process.

QI tools

- Facility level QI project template
- Process mapping—flow chart
- Root cause analysis (fishbone, why tree, other)
- Decision matrix
- Pareto Principle
- QI Project documentation (interventions, PDSA changes, other)

QM tools

- National QM guidelines/strategy
- Facility level OA
- Facility QM plan & work plan
- Quality teams
- Coaching tools
- Coaching toolkit
- Site visit documentation
- Facilitation

PM tools

- Data collection tool
- Indicator guide
- Run charts
- Reports—facility level
- Distribution of reports to region/national levels
- Data action plan (data use)

5. Subsequent Certification

Post-certification activities focusing on continuing education should be an important component of coaching activities and considered in the recertification process. Given the time requirements of coaching, these criteria should be reasonable and sufficient to assure that the coach is current with important changes in the field.

The national QM program will define a formal process for recertification of their QI coaches. This includes who will oversee the process of recertification and how it will be done. It is important to maintain adequate and current skills in areas that include, but are not limited to, QI methods, national policies and health sector data. A review of the performance of the coach should be included in the recertification process to flag any areas of concern that have occurred during the period. Recertification should occur within a three-year time frame.

Outline of the Certification Process

Tools to support:

- QM Coach Job Description
- QM Coach Initial Competency Assessment and Development Plan
- QM Coach Mentor's Observation Checklist
- QM Coach Performance Evaluation Certification Assessment

Step 1. Identifying potential coaches

Finding experienced/appropriate candidates: how and where to distribute the position notice (e.g., through facilities; through district, regional and national offices).

Initial screening:

- QM knowledge
- Performance in accepted QM training program
- Clinical/QI experience and background
- Work history
- References, recommendations

Step 2. Interviewing coach candidates

Share job description/performance evaluation

Discuss/assess:

- Initial screening items, above
- Coaching, facilitating, training experience
- Ability to manage work schedule (planning ahead to set visits, group meetings)
- Enthusiasm for this work
- References will be checked (request permission to speak with anyone who may have insight/information re: the candidates' skills)

Step 3. Helping new coaches prepare, develop competency—initial competency assessment and development

See tools and examples:

- Quality Coach Job Description or TOR
- QM Coach Initial Competency Assessment (development plan)
- QM Coach Mentor's Observation Checklist
- QM Coach Reporting (documentation) Tool
- Generic Coaching Curriculum Outline

Step 4. Assessment at 90 days

Refer to: Job Description, Initial Competency Assessment, Observation Checklist, and Documentation

Step 5. Support during first 6 months before certification

Cycle of:

- Coaching/supervision
- Reports
- Observation
- Peer sharing and Learning with other coaches

Step 6. Certification after successful performance evaluation

See tool: Quality Coach Performance Evaluation and Certification Assessment

7. Ongoing support

- Coaching/supervision
- Reports and feedback
- Periodic observation
- Coaches forum (e.g., team of coaches)—monthly conference calls/webinars, regular meetings

Step 8. Recertification

Within 3 years or after 6 months or more of inactive coaching



Materials and Tools

The following materials and tools are adaptable resources designed to support the coach certification process.

- 1. QI Coach Job Description**
- 2. Terms of Reference for QI Coaches**
- 3. QI Coach Reporting Tool**
- 4. QI Coach Initial Competency Assessment**
- 5. QI Coach Mentor's Observation Checklist**
- 6. QI Coach Performance Evaluation and Certification Assessment**
- 7. Generic Coaching Curriculum Outline**
 - » Modules program leadership can use to help build coaching capacity

1. QI Coach Job Description

Quality improvement coaching

Quality Improvement is an interdisciplinary process designed to raise the standards of health care delivery to improve health outcomes of individuals and populations.

It involves focusing on systems, measuring performance, improving processes of care that lead to improved outcomes, working in teams, involving stakeholders and testing changes, with peer learning whenever possible.

Quality improvement coaching is a process that enables learning and development to improve performance. Successful coaching requires a knowledge and understanding of process as well as the variety of styles, skills and techniques that are appropriate to the context in which the coaching takes place.

Duties and responsibilities

Liaises with facilities within their jurisdiction regularly to facilitate the following:

- Setting up Quality Management Program structures at facility level e.g., QI Committee and QI teams; holding regular QI meetings at least monthly; development of annual Quality Management Plans; and development of work-plans for QI projects
- Conducting annual Organizational Assessments
- Supporting facility teams in performance measurement e.g., data abstraction, verification, validation, and entry into the performance measurement database
- Providing technical support in the analysis of the data prior to submission of QI reports. Additionally providing technical support to facilities for developing and using process indicators to track progress of QI activities

- Providing technical support to facility teams as they prioritise, analyse causes of performance gaps, develop and test interventions through PDSAs, and evaluate their facility-level programs
- Participating fully during the various peer learning platforms like the Regional Group meetings and review meetings
- Supporting the documentation of key QI activities taking place at the facilities e.g., QI Committee meeting minutes, and QI Projects
- Other duties as assigned

Other relevant skills

- Ability to work independently, with possession of strong mentorship and coaching skills
- Thorough knowledge and understanding of Quality Improvement
- Knowledge of the country HIV program
- Should possess problem solving skills and be detail-oriented
- Strong written and verbal communication skills, with the ability to work in teams and manage time and projects
- Basic computer knowledge/skills and experience with use of Microsoft applications such as Word, Excel, PowerPoint and Access
- Willingness to travel

Education

Health-related professional qualification, e.g., diploma or degree.

Experience

Possess at least 5 years of experience working in the country public health sector and/or quality management systems.

2. Terms of Reference for QI Coaches

These Terms of reference will guide the activities and functions of the national QI coaches.

1. Objectives for the QI coaches

- To provide QI coaching and impart skills to spread QI knowledge and create competencies across the national QM program
- To establish sustainable QM Structures in the healthcare facilities
- To provide a link between the facility QI teams and national level QM program
- To promote a QM culture at all levels of health care in the region
- To enhance shared learning between facilities on successful quality improvement projects

2. Functions of the QI coaches

The QI coaches will be engaged starting _____.

The following will be their core functions:

- Will develop a supportive relationship with the facility team, including leadership personnel and help foster a culture of quality at the facility
- Will perform organizational assessments (OAs); provide feedback to the facility and assist in development of priorities and workplan to address gaps and identify improvement opportunities
- Periodically provide technical support to quality management committee, in areas such as QM planning, performance measurement (PM) and quality gap assessment, etc.
- Support ongoing processes to assess status of PM, QI projects and quality program structure
- Review progress of QI projects and attend QI project team meetings periodically to provide feedback, support and direction with focus on improving systems of health care delivery
- Perform regular communication with the facility staff and leaders via email, telephone, ZOOM and other available platforms
- Conduct quarterly visit to each facility in the region with focus on QM

- Provide onsite training and mentoring to enhance team effectiveness as needed
- Review supporting documentation and make recommendations for record keeping, e.g., documentation organization and minutes format
- Create shared learning opportunities between facilities and districts to enhance modeling and replication of best practices
- Support facilitation of QM didactic trainings
- Serve as resource person to attend to consultations on QI issues in the region
- Support health facility staff in writing up their successful QI efforts and assist in dissemination of best practices utilizing the available platforms
- Coach staff members to successfully document the progress and outcomes of QI projects
- Actively participate in planned QM review forums at the regional and national levels

3. Composition

Describe the coaching group composition and regions/facilities they will support.

4. Communication and reporting:

- Monthly telephone/ZOOM communication between the QI coaches and national QM program
- Ongoing communication among QI coaches for peer support
- Quarterly reports on QI activities to be submitted to the district, regional and national level
- QI coaches to convene every 6 months for face to face meetings for team building and to review progress. Lessons learned will guide future QI coaching activities
- All activities of QI coaches will be documented

5. Review period

The terms of reference will be reviewed annually by QI coaches.

Terms of reference endorsed by:

Name of QI coach: _____

Date: _____

Region: _____

Coaching program leadership

Name: _____

Date: _____

3. QI Coach Reporting Tool

Quality Management Coaching Reporting Template

The Coach is required to document all coaching activities performed with a facility team and submit a report as directed by program leadership. Activities include assessing team progress on QI activities and

providing recommendations for improvement. The report should be completed after each coaching visit/interaction. The Coach is required to provide feedback from the coaching visit to the site at the end of the visit and submit the report within 24–72 hours to relevant program managers or staff. The coach and the facility team should retain a copy for recording purposes.

Facility: _____

Date of encounter: _____

Name of Coach: _____

Facility team members in attendance: _____

Name	Designation	Role of facility team member	Contact address

QI project/performance indicators prioritized for this quarter/period (defined by national program)

Coaching encounters	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Specify the type of encounter in this visit (physical on-site visit, telephone, WhatsApp, email, other)				
No. of visit/encounter today represents in the quarter (track the # of coaching encounters per quarter)				

Briefly describe the purpose (your objectives) of the visit:

Action plan

(Discussion with the team—group identifies actions to take based on the problems/indicators the facility will focus on before the next visit).

Program component	√ all that apply	Problem/gap	Action	Who	When
Quality management					
Annual OA					
Annual QM plan					
QM program work plan					
QI minutes or activity reports					
Other					
Performance measurement					
Data reports					
Data validation plan					

Random review of medical records to check data					
Data visualization e.g., graphs, run charts					
Other					
Quality improvement					
QI project template and work plan					
Visual display of QI process e.g., flow chart/process maps, fishbone, why tree					
PDSA worksheets					
Other					
Capacity building (training/sensitization)					
Training facility staff on any component—QM/PM/QI					
Identifying training needs					
Other					

Summary of feedback

Enablers identified for QI team to reinforce	Issues/gap identified for QI team to address (include timeline)	Describe any system issues identified during this visit to be raised for escalation by coach to higher authorities/supervisors (include timeline)
1.	1.	1.
2.	2.	2.
3.	3.	3.

Additional remarks:

Date of next encounter:

Report shared with – team/focal person:

Signature (designated Coach):

Name/signature (QI team participants):

4. QI Coach Initial Competency Assessment

(Complete on new Coach's first day, use to guide mentoring during start-up)

New Coach seeking certification: _____

Mentor: _____

Date: _____

The QM Coach can describe:

√ all that apply	Task area:	Comment:
	Principles of QM (e.g., QI vs QA)	
	Approach to QM (coaching, mentoring)	
	QM program components (leadership, committee, plan, work plan, staff engagement, performance measurement, QI projects, consumer involvement, outcome measures, disparities, sustainability, communication, evaluation)	
	Conducting a site visit	
	Conducting an OA (initial and subsequent)	
	Coaching a site on implementing a QI project (e.g., use of problem analysis tools, process mapping, use of PDSA, describing interventions/changes, measurement)	
	Coaching a site on documenting and communicating QI to leadership/staff (e.g., maintaining a QI corner, sharing data, storyboards)	
	Conducting a QM training (basic QI content, resources, approach and design)	
	Facilitating a group (e.g., Regional Group, team meeting)	
	Engaging consumers in QM	
	Managing tasks in timely manner (e.g., prioritization, personal work calendar)	
	Documenting and reporting activities (e.g., deadlines, content, forms, data entry)	
	Finding QM resources	
	Finding help (e.g., networking with other coaches, mentors, national team)	

QI and coaching training – describe any national or international training programs attended and outcomes achieved as a result

1.

2.

3.

Next steps in skill development

1.

2.

3.

4.

Next meeting of Mentor and Coach (date/time/venue):

5. QI Coach Mentor's Observation Checklist

For use by Mentor/Supervisor during new Coach's first 90 days

Coach in training: _____

Mentor: _____

Site: _____ Date/time: _____

Site leader present: _____ Phone: _____ Email: _____

Type of session (e.g., initial visit, OA, training, QI project monitoring): _____

Facet of visit	Mentor's comments
Engages staff	
Engages consumers who are present	
Clarifies leadership (who is responsible for QM program implementation and next steps identified today)	
Concisely explains purpose of visit (e.g., introduction, OA, training)	
Communicates objectives for today, gains consent	
Encourages participants to express themselves	
Flexible in response to site's needs, questions	
Maintains focus throughout session	
Demonstrates QM knowledge and skills	
Positive, encouraging, even when challenges are apparent	
Recaps findings (e.g., site visit, OA, project next steps)	
Clearly states next steps and due dates, gains consensus	
Achieves clarity re Coach's next steps (maintaining contact, ensuring that Next Steps are completed)	

Next steps in the new Coach's development: _____

Mentor will check back with Coach on (date): _____

6. QI Coach Performance Evaluation and Certification Assessment

Quality Coach position overview

The Quality Coach works with clinical site staff teams and consumers to support them in assessing and strengthening their capacity to manage and implement quality improvement activities. This occurs through ongoing contact, on-site visits, individual and multi-site training, and participating in regional/national coaching group meetings.

There is an initial period of 6 months* during which the new candidate is observed and receives support and mentoring. Successful evaluation after 6 months–1 year results in Coach Certification (see criteria below). The Coach Certification is valid for 2 years.

*Time periods to be defined by the national program.

Quality Coach name:	Date of assessment:
Reports to:	Coach met certification criteria: Yes No
Assessment conducted by:	
Next assessment due date (mm/year) to maintain Certification:	

Coach successfully helped their facility

1. Establish/maintain a fully functional Quality Committee (i.e. meets regularly, discusses data, uses a QM plan): Y/N

Comments:

2. Complete at least 1 Performance Measurement Report: Y/N

Comments:

3. Complete a QI project, describe and document interventions with demonstrated success in re-measurement: Y/N

Comments:

4. Use data to identify the next QI Project(s): Y/N

Comments:

Performance evaluation and certification scoring key

(an average score of 3 or above is needed for certification)

- 5 Superior
- 4 Very good. Exceeds expectations
- 3 Good. Meets expectations
- 2 Does not fully meet expectations
- 1 Does not meet expectations

Competency area	Quality Coach certification	Score 1–5
Knowledge up to date	QM Theory (QI and QA—National Quality Strategies and Policies)	
	QM infrastructure components (leadership, committee, plan and work plan, staff engagement, performance measurement, QI projects, consumer involvement, assessing outcomes, evaluation)	
	QI project process: prioritization, team approach, performance measurement, PDSA, incl. problem analysis tools, documentation	
	QM program evaluation	
	Patient care environment, processes	
Work Management up to date	Developing a schedule for coaching activities; Managing time, meeting expectations for frequency of visits and other contacts	
	Developing a coaching plan for a facility including action steps and timeline	
	Helping to develop forms and templates for site use, documentation forms, coaching program policies and procedures	
	Working as a team member, relating positively to facility staff and to the coaching team	
	Documenting and reporting work	
	Meeting deliverables on time	
Other up to date	Ability to act as a mentor coach	
	Actively participating in QM forums at regional, national level	
Skills up to date	Demonstrating a positive coaching philosophy	
	Conducting OA, giving feedback and recommendations guiding facility teams to reach identified QM priorities	
	Interpreting data and assisting sites to regularly review performance data trends—do they show improvement on key outcome measures?	
	Developing QM plans and work plans	
	Using QI Tools	
	Assisting sites with communication (e.g., sharing and posting up to date QI goals and data; creating storyboards, sharing success stories, writing abstracts)	
	Fostering consumer involvement by consumers and staff teams; engaging consumers in priority setting and as a participating member of a site team	
	Helping to develop forms and templates for site use, documentation forms, coaching program policies and procedures	
	Training staff and consumers in quality to enhance consumer involvement	
	Training in QM basics	

7. Generic Coaching Curriculum Outline

Unit objective: Deliverables/outcomes of training

Unit description: What needs to be covered to meet this objective; general description of training

Unit topic: Introduction	
Unit objective	Unit description
<p>By the end of this unit, participants will be able to:</p> <ol style="list-style-type: none"> 1. Understand the goals and objectives of the course curriculum 2. Understand the expectations of becoming a certified QI Coach 	<p>This unit will include ground rules, learning objectives, introduction of coaching certification criteria.</p>
Unit topic: Review of QI principles	
Unit objective	Unit description and materials
<p>By the end of this unit, participants will be able to:</p> <ol style="list-style-type: none"> 1. Explain the definition of Quality 2. Describe the difference between Quality Improvement and Quality Assurance 3. Explain the fundamental concept of improvement 4. List the principles of quality improvement and describe their meaning by giving examples of the principle in action 	<p>This unit will include an overview of QI Principles and their meaning with emphasis on the coaches' perspective.</p> <ul style="list-style-type: none"> • PowerPoint presentation reviewing QI principles and systems thinking in relation to the role of a Coach and supporting teams to make and sustain improvements • Satisfaction Continuum interactive activity to bring out experiences and perceptions of quality from the eyes of a patient or customer of the system and a provider in the system
Unit topic: Coaching skills and behaviors	
Unit objective	Unit description and materials

<p>By the end of this unit, participants will be able to:</p> <ol style="list-style-type: none"> 1. Understand the framework of coaching for QI 2. Apply different feedback principles to build relationships 3. Understand how to plan and facilitate productive meetings 4. Understand the qualities of an effective coach 5. Understand how to use data in the context of coaching 	<p>This unit will include an overview of skills and behaviors required for effective coaching. It will also include case studies and role playing different coaching characteristics to depict coach behavior. Issues on how to give and receive feedback will be addressed.</p> <ul style="list-style-type: none"> • PowerPoint presentation unpacking the 6 steps constituting the framework of coaching as well as skills and behaviors required for effective coaching and effective feedback principles • Case study on characteristics that depict coach behavior • Role play on coach functions and techniques of building rapport • Group work on effective leadership strategies as a coach • Tools: <ol style="list-style-type: none"> a. Generic Coaching Agenda b. Coach Reporting Template
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Unit topic: Communication and managing resistance

Unit objective	Unit description and materials
<p>By the end of this unit, participants will be able to:</p> <ol style="list-style-type: none"> 1. Understand communication styles relevant for QI Coaching 2. Recognize and address barriers to effective communication 3. Understand reasons and possible solutions for resistance to change 	<p>This unit will focus on communication aspects that support coaching, including defining resistance, causes of resistance and the different approaches that a coach can utilize in managing resistance.</p> <ul style="list-style-type: none"> • Presentation focusing on how to identify barriers and resistance to change and facilitation techniques to manage resistance • Case study on managing resistance and facilitating dysfunctional teams

Unit topic: Performance measurement

Unit objective	Unit description and materials
<p>By the end of this unit, participants will be able to:</p> <ol style="list-style-type: none"> 1. Explain why it is important to measure 2. Interpret various data presented to them (based on country specific M&E) 3. Identify the need for improvement based on data 4. Display data in various ways 5. Understand how to develop a performance indicator 6. Help site to develop and implement a measurement plan 	<p>This unit will cover issues of performance measurement as they relate to coaching work. The importance of performance measurement, the data collection and validation process, interpreting and presenting data. As coaches are expected to use improvement science in different settings, various country specific M&E data sources will be discussed.</p> <ul style="list-style-type: none"> • Presentation focusing on the basic principles of performance measurement and the coach role in the data collection, validation, reporting and interpretation process • Case study review and interpretation of a country specific performance measurement report; exercise creating a Pareto chart and run chart

Unit Topic: Quality Management—sub sections 1. OA and 2. QM plan

Unit objective	Unit description and materials
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<p>By the end of this unit, participants will be able to:</p> <ol style="list-style-type: none"> 1. Objectively conduct an OA with its different levels of implementation 2. Make recommendations to guide a facility to develop their QM Plan/Goals/Action Plan 3. Support facility team in monitoring and evaluating the implementation of the plan to ensure attainment of their quality goals, objectives and outcomes 	<p>This unit will include exercises to support conducting an Organizational Assessment (OA) and giving recommendations based on the scoring. The unit will include how to write and periodically evaluate a Quality Management Plan.</p> <ul style="list-style-type: none"> • PowerPoint presentation reviewing elements of a Quality Management program • Role play of a simulated clinic team and coach conducting an organizational assessment • Practical session with each participant scoring an organizational assessment based on the scenarios demonstrated during the role play • Group work with mentor coaches discussing the scoring process and participants justifying their final scores. Focus on reaching consensus and making recommendations to facility • Tools: <ol style="list-style-type: none"> a. Organizational Assessment tool, scoring and recommendation sheet b. QM Plan template with exercise and QM Plan Evaluation sheet
Unit topic: Using data for improvement	
Unit objective	Unit description and materials
<p>By the end of this unit, participants will be able to:</p> <ol style="list-style-type: none"> 1. Know how to use both qualitative and quantitative data for improvement 2. Understand how to identify and quantify the reasons for gaps in performance (Pareto principle) and develop interventions 3. Develop and implement PDSA cycles 4. Be able to assist site to create a QI project plan and action plan based on data 	<p>This unit will focus on helping coaches understand how to base improvement goals and projects on the measured data. The unit will use case studies and data reports to highlight problems and identify opportunities for improvement.</p> <ul style="list-style-type: none"> • Presentation describing how to identify and use qualitative and quantitative data sources for improvement • Case study using different data reports and identifying gaps, applying the model for improvement, developing PDSA cycles, exercise on creating a Pareto chart and run chart • Tools: <ol style="list-style-type: none"> a. QI project plan and action plan
Unit topic: Project management skills and tools	
Unit objective	Unit description and materials
<p>By the end of this unit, participants will be able to:</p> <ol style="list-style-type: none"> 1. Demonstrate an understanding of time management skills and tracking tools to prioritize coaching duties—develop a personal coaching action plan 2. Demonstrate the ability to use timeline tracking tools (Gantt chart) 3. Discuss team building and team cohesion strategies 4. Use different QI tools to support QI implementation, reporting and communication in the facility (region or national level) 	<p>This unit will focus on content for documenting and reporting coaching visits including frequency and channels of communication for the coach report. The unit will also focus on the importance of planning and reviewing facility QI project plans regularly. The unit will review planning concepts including project prioritization/feasibility, tracking and various tools that can be used.</p> <ul style="list-style-type: none"> • Presentation describing project management and different documentation strategies and tools for reporting

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