A Team Coaching Model for Health Care Improvement

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International Clinical Microsystem Festival
February 28, 2013

Aim of Today

• Meeting strategic improvement goals is a challenge.
• High value, quality care and services with best patient and staff outcomes
• Field experience and research findings point to the importance of coaching and helping front line teams assess their current state and establish a rhythm of improvement processes directed at strategic improvement and goals.

• Let’s explore and discuss a Team Coaching Model to help front line staff
Coaching Interdisciplinary Teams in Health Care Improvement

• The gap between desired and actual quality of health care continues to exist despite years of efforts to improve outcomes.
  – Improvement methodology might explain the differences and may not get to the root cause of reinforcement of basic improvement skills and knowledge within the context of the workplace.
• Small improvement teams are often faced with daily on-the-job crises and organizational inertia that impacts the team’s ability to follow through on well intended improvements and goals.
• Coaching, which has been used in a variety of fields, may represent an opportunity to address the need for helping interdisciplinary health care improvement teams in their own context within and between structured learning sessions.

Background

• Empirical evidence supports the concept of coaching health care interdisciplinary professionals in making improvements in health care.
• Haphazard coaching efforts are hit and miss in achieving desired results
• Health care leaders are often reluctant to invest in coaching to support front line development of improvement knowledge and application
• Resources are limited..we need coaching that is valued added and can support and help strategic improvement
• Coaching Literature is plentiful
• Literature specific to health care improvement coaching is limited
Responding to challenges to meet required and necessary changes in primary care, practices recognize they do not have the expertise, “Will, Ideas or know how.”

Evidence is emerging that coaching is effective.
- 7 of 8 randomized trials found improved patient care
- Systematic review of 38 studies found a moderate but significant improvement in implementation of evidence-based guidelines

What is Coaching Health Care Improvement?
Coaching
"Evoking Excellence in Others"

"The only way to coach effectively is to enter into a reciprocal relationship where 'coach' and 'coachee' engage in a dance of mutual influence and growth"

Peter Senge,
MIT and Society for Organizational Learning

... is not telling people what to do; it is giving them a chance to examine what they are doing in the light of their intentions.

The Discipline of Coaching

"...Building relationships among people who are continuously learning about the changing environments in which they live and work, intervening in and moving to set aside ineffective and counter-productive habits, and building new skills, practices, habits, and platforms for collaborating in this ever changing world."
Coaching

“Coaching puts the center of its attention on the question how a person can help other people develop new capabilities, new horizons, and new world of opportunity for themselves and those around them.”

Helping

1. Process of “helping” human systems
2. One works daily with -individuals -small or large groups -systems
3. Central concern of helper is to improve the ability of the one or ones being “helped” to increase their own ability to help themselves
Help, Helper, Helping

• Consciously trying to help someone else to accomplish something

• Understanding is needed for the helper to know when to offer help and what would be helpful if asked for help.

• Dynamics of helping relationships
  – Trust
  – What helper must do to ensure that help is provided
  – What any recipient must do to facilitate the process

• Helping
  – Process that underlies cooperation, collaboration and many forms of altruistic behavior.

George Clooney

• …Quickly learned the dangers of just dropping in on a humanitarian crisis: as a way of giving back to a refugee village where he and his father stayed, he donated money to build a well, huts, and a community center.

• “A year later, the next-door villagers—who wanted water and needed shelter—ended up killing some of the people to get to that well and to get to that shelter,” Clooney says, his voice trailing off.

• “It’s devastating. Your response is … to continue to try to help, but we have to be very careful—and sometimes helping is not throwing money at a problem.”
Helping

• After driving across arid plains dotted with huts and red acacia trees, we pull into a compound guarded by soldiers manning a jeep crowned with a machine gun. Inside a thatched hut, the Abyei administrator, Deng Arop, and the chief of the Ngok Dinka tribe, Kuol Deng, greet Clooney warmly and gesture for the group to sit. "Our job is to ask you how we can help," Clooney says—and then he listens...“

Hackman & Wageman

Team Coaching

“...direct interaction with a team intended to help members make coordinated and task-appropriate use of their collective resources in accomplishing the team’s work.”

-A Theory of Team Coaching
Academy of Management Review
2005
Possibility

- Coaching to increase a teams capacity to find alternate routes is a core component of having hope, which in turn sustains one’s effort.
- Coaching can help reach desired goals by developing more precise and attainable goals or by helping them vividly recall past successes. (agency) “I can-ness”
- Coaches will be well served by learning techniques to help teams become more hopeful...

The Question

(Three Perspectives)

What team coaching actions are perceived to support health care improvement activities by:

- Those who are coached “coachees”?
- Those who are coaching “coaches”?
- Those who are leading the microsystem “leaders”?
Coaching Interprofessional Health Care Improvement Teams: The Coachee, The Coach and The Leader Perspectives

**Successful Coaching Experience**

- Context
- Local Context
- Site Visit
- Communication
- Expectations
- Relationship
- Interpersonal Skills
- Helping
- Encouragement
- Clarifying
- Feedback
- Teaching
- On Track
- Improvement, Measurement & Meeting Skills
- Resources
- Technical Skills
- To Do List/Task Books

**Participant Comments**

"The coaches can never understand the dynamics of centers without having visiting them to meet the staff and see how things are organized."

"I think the coaches are slowly realizing that some ways of doing things have to be adapted to our individual culture."

"The site visits were very helpful...look at what we were doing and not just telling him over the phone...You have to tailor things to the uniqueness of each unit."


Our coach is fantastic. She is truly part of our lead team. She made the commitment to weekly phone calls and was available by phone or email any other time we needed her. She was a big part of our success...

To be successful they had to know what a coach was and there were many perceptions of what it meant to be a coach or what we were bringing to the table.

Never felt like we were a burden to the coaches. Always felt like they were open minded and they laughed with us and never laughed at us or were critical...supportive and non-judgmental.

It was always very encouraging for us to hear from our coaches that we were staying on task and doing well considering the amount of work we have accomplished...

Personal stories and experiences we told were often helpful in reducing their fear of all this new stuff and we could share stories of how it gets better.

Helped us stay on task so that we were not going in a million different directions. Balanced suggestions guided us. She showed real interest. It helped to stay in touch.

Relational Communication, Expectations, Interpersonal Skills

Coaches

"Our coach is fantastic. She is truly part of our lead team. She made the commitment to weekly phone calls and was available by phone or email any other time we needed her. She was a big part of our success...

The first thing I learned from our coach was setting up some of what was going on in what they knew better.

Process would benefit from a more enjoyable environment. Probably more enjoyable for the coach to know us better.

Never felt like we were a burden to them. Always felt like they were open minded and they laughed with us and never laughed at us or were critical...supportive and non-judgmental.

"Personal stories and experiences we had were often helpful in reducing their fear of all this new stuff and we could share stories of how it gets better.

Helped us stay on task so that we were not going in a million different directions. Balanced suggestions guided us. She showed real interest. It helped to stay in touch."
“The team said the meeting skills were a tool that helped them accomplish the work they wanted to accomplish. They were grateful for the ability to get a lot of work done in a short period of time using meeting skills.”

“...the team felt they didn’t have the time to always plan to ask for help and always plan to go to the administration to help us...I think there is no harm in just keeping it in mind what you are doing, what key personnel are doing, what speed has always been...”

“...when we don’t have a deadline something will come up and put whatever project we are working on the back burner...you know you have a coach checking with you despite what else is going on.”

Reported Coaching Attributes

(A quality or feature regarded as a characteristic or inherent part of someone or something. Merriam Webster)

- Good listener
- People person/Personable
- Dedicated/committed to group and work
- Bring people together
- Easy to approach
- Genuine Interactions
- Attentive
- Flexible
- Accessible
- Non-judgmental
- Observer
- Challenging
- Open-minded
- Friendly
- Enabler/promoter
- Enthusiastic
- Inquirer
- Motivator
- Non-threatening
- Welcoming
- Belief of process
- Courteous
- Thoughtful
- Collegial
- Non-pedantic
- Kind
- Honest
- Inspires
- Nurturing
- Patient
- Upbeat/energetic
## Important Considerations

- Coaching matters
  - Context
  - Helping
  - Relationship
  - Technical Skills
- Inside vs Outside Coaching
- Novice to Expert
- Coaching Development and Support
- Leader development in improvement knowledge
- Team coaching may bridge the improvement collaborative learning session to the workplace.

## Team Coaching Model

<table>
<thead>
<tr>
<th>Pre-Phase</th>
<th>Action Phase</th>
<th>Transition Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getting Ready</td>
<td>Art &amp; Science of Coaching</td>
<td>Reflection, Celebration &amp; Renew</td>
</tr>
<tr>
<td>&quot;Meeting them where they are&quot;</td>
<td></td>
<td></td>
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<tr>
<td><strong>Context</strong></td>
<td><strong>Relationships</strong></td>
<td><strong>Reflection on</strong></td>
</tr>
<tr>
<td>- Review of past improvement efforts and lessons learned tools used</td>
<td>- Helping</td>
<td>improvement journey</td>
</tr>
<tr>
<td>- Preliminary system review - Micro/Meso/Macro</td>
<td>- Keep on track</td>
<td>- What to keep doing or not do again</td>
</tr>
<tr>
<td><strong>Site Visit</strong></td>
<td><strong>Communication</strong></td>
<td>- Review measured results and gains</td>
</tr>
<tr>
<td>- Resources (Data)</td>
<td>- Virtual</td>
<td>- Assess team capability and coaching needs &amp; create coaching transition plan</td>
</tr>
<tr>
<td>- Logistics (Time)</td>
<td>- Face-to-Face</td>
<td>Celebration!</td>
</tr>
<tr>
<td><strong>Expectations</strong></td>
<td>- Available &amp; accessible</td>
<td>Renew and re-energize for next improvement focus</td>
</tr>
<tr>
<td>Clarity of aim</td>
<td>- Timely</td>
<td>Evaluate coaching</td>
</tr>
<tr>
<td>Leadership &amp; Team discussions about roles and logistics</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Encouragement</strong></td>
<td><strong>Clarifying</strong></td>
<td></td>
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<tr>
<td><strong>Feedback</strong></td>
<td>- Improvement Knowledge</td>
<td></td>
</tr>
<tr>
<td><strong>Reframing</strong></td>
<td>- Expectations</td>
<td></td>
</tr>
<tr>
<td>- Different perspectives</td>
<td>- Group dynamics-new skills</td>
<td></td>
</tr>
<tr>
<td>- Possibility</td>
<td><strong>Improvement Technical Skills</strong></td>
<td></td>
</tr>
<tr>
<td>- Teaching</td>
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<td></td>
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</tbody>
</table>

Pre-Phase

“Getting Ready” “Meeting them where they are”

- Set expectations
  - Leader of coach
  - Coach of Leader
  - Coach + Leader of Team
- Leadership discussions
- Clarity of aim
- Prior improvement experience
- Preliminary system review: Micro/Meso/Macro systems
- Logistics (Time)
- Resources (Data)
- Site Visit?


Important to “adjust” the external environment to support and enhance flow

Action Phase

Art and Science of Coaching

- Relationships
  - Helping, Keeping focus and staying on track
  - Interpersonal Skills
- Communication
  - Virtual, Face-to-Face, Available & accessible
  - Timely
- Encouragement
- Clarifying & Technical
  - Teaching Improvement Knowledge & Providing To Dos and Checklists
- Reframing
  - Different perspectives
  - Possibilities

- “Knowing When”
- Focus on process and tasks initially to help group process
- Calibration of hierarchical roles and positions
- Not assuming “one up” position

Ideal combination of encouragement and challenge that facilitates optimal performance

Knowing When

The Art of Coaching

The Art of Coaching

- Push vs Pull
- Ask vs Tell
- On stage vs Back Stage
- Observe vs Show
- Listen vs Talk
Knowing When

Swedish SOH
“Sit on Hands”

What Does This Mean?
Coaching Intensity over Time…

Always Sitting On Your Hands!

Team Coaching Model Over Time
Pre-Phase, Action Phase, Transition Phase
Transition Phase

Reflection, Celebration & Renewal

- **Reflection** on improvement journey
  - what to keep doing
  - what to be sure and not do again
- **Review** measured results and gains
- **Assess** team improvement skills capability and group dynamics to match coaching needs to create coaching transition plan
- **Celebration!**
- **Renew and re-energize** for next improvement focus
- **Evaluate Coaching**

- **Transition Assessment Tools**
  - (Individual & Team)
  - Improvement skills
  - meeting skills & tools of improvement
  - Group Dynamics
- Create transition coaching plan
- How will new members be oriented?
- Assess Coaching Experience


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A Small Test to Learn if Team Coaching Matters

Figure 1: A Small Test to Learn if Team Coaching Matters
5 Themes

• Creating conditions for successful Improvement
• Staff engagement and development
• Leadership engagement and development
• Team Coaching benefits
• Team Coaching Recommendations

Without Coaching & With Coaching

“The two times in the learning session without a coach, it was unclear how and what you were suppose to do. It was hard to reach the aim of the work. When you left the session you weren’t sure what you were to work on back at department.”

More positive atmosphere with coach-inspired and motivated Weekly meetings are good between the learning sessions

Big difference to have manager involved-Coach met with them and described process and how they could help- Leaders encouraged us more than in the past. They were curious. Before they said YOU should do the improvement and they were not involved. Now they say "What is happening and what are your results?” and are interested
With and Without Coaching

• Learned a way to actually work with improvements
• The team is doing well and have a good team spirit. All members being active in the work. Helped each other. Focusing on the aim. Have experience when this wasn’t the case.

What made the difference that everyone got along and helped each other?
• The team was working together…the structure for meeting and improvement was helping this

Based on this experience, what do you recommend for improvement?

1. The need for structure for doing improvement...have methods and tools like PDSA. First it was a little difficult to use, it is making value to document what you are doing.
2. Good to have coach to inspire and support you
3. Must have management support and involvement.
4. Must spread and show colleagues what you are doing. Involve colleagues outside the team. Link to colleagues.
The Microsystem Academy at The Dartmouth Institute

- Researching, coaching, and leading clinical microsystem development since the early 1980s

- “Coaching the Coaching” program integrates professional experience, empirical and cutting-edge research methodologies and information in a rigorous curriculum of experiential learning in the art and science of interdisciplinary microsystems coaching

Coach In Training

- Microsystems has given me a solid set of skills along with a theoretical framework to structure improvement work in a way that sticks. I find that the focus on rapid cycle improvements and measures of improvement gives us fast feedback and allows us to shape our interventions.

- When an intervention gives us unexpected results, it is not a Failure but a chance to refine the process.

- Staff is starting to trust that we will respond to their feedback and ideas that are counterproductive will be modified as needed.

- I am thankful for the opportunity to learn about Microsystems and practice of the skills. Our monthly sessions were instructive and supportive. I liked hearing that others had similar experiences and some of the same challenges. It was truly wonderful to be part of such a non-hierarchical group. True learning has occurred.

- My experience and comfort with Microsystems continues to grow each day—and I have started working with a second group of nurses on implementing an Early Warning Score. We have two physicians that are actively involved and in this team I am truly sitting on my hands and letting the team run with the topic. At the kick off meeting I did some basic education regarding Microsystems process and meeting skills. I had done the research on the EWS previously so I shared my knowledge. The team has now taken the lead as I sit at the edge of my seat with my mouth shut.

- The DMIC ladder has given us a wonderful graphic to explain our purpose and plot our progress.

- My role on the MedSurg Quality Improvement team will continue beyond the need for the coaching relationship. It is a wonderful place to implement changes and grow my skills as well of those around me.

- Hopefully each member of the team will “become the coach” and lead the team through each phase of growth.
Coach In Training

• The **group participants want to gain confidence** in the DMIC tools, to complete more 5P assessments (awaiting the results of a through the eyes of the patient exercise next week) in the shorter term and understand that they will **become self-directing as a group** with coach input as required on an ongoing basis.

• The **effective meeting skills have been a real success**. I plan that we will continue to work together for another four or five months but I can **see their potential to grow, branch out** to support subgroups undertaking improvement within the ED and become the DMIC front-line improvement leaders.

• **We’re still finding our feet and walking up the ramp slowly but surely and enjoying every step of the way!**

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Coach In Training

• Best part of this coaching experience: learning this process, I am excited to apply it

• Most challenging aspect of this coaching experience: not being proficient

• How I will use my experience from eCTC in my professional work: just about daily! **I have transitioned to quality and process improvement full time, and want to prove to the organization the need for it, so if I do a good job we will continue.**

• **Lessons learned: need to go slow to make the best improvement. This is very hard for me. I want things done yesterday.** I did not always have the correct representation on the team.

• **I find process mapping eye opening.** Also, how simple a PDSA can be to show small tests of change.

• **The most important, we have the knowledge and power to make these changes**
Coach In Training

Action Phase

• Meeting Process: love the steps to effective meeting.
• This has instant gratification all over it. The way we held meetings prior accomplished so much less.
• The action plan is my (our) work list all in one, with clear statements of who owns what by when.

Coach In Training

Personal coaching story:

• I have experience in managing/supervising a team(s), which is totally different in my perspective in being a coach for a team.
  – I am used to tasking individuals in my office versus providing them with recommendations. I usually do things on my own to get the job done right.
• Being a coach has taught me to step back, listen, effectively communicate with everyone on the team and analyze what are they asking for to improve and with that how do I turn the table over and have the team take accountability to make the change.
• As I work with team letting go of responsibilities such as creating the next agenda, or coming up with a theme for their Aim of improvement has been a challenge. However, seeing the team progress and taking control of everything and just being there to support, encourage, analyze, and assist has been a great experience.
• It open me up to see different perspectives and that there is not one way of doing things to making it more effective and efficient. Providing the team with guidelines, samples and recommendations and letting them discuss it as team has been successful.
• Thus far my coaching experiences have been very encouraging and positive. I will continue to meet with my team coaches every month face to face or more should things arise for advice and support.
  •
Coach In Training

Best part of this coaching experience:

Creating a genuine relationship with this practice – I am very excited to be driven by their needs outside the confines of a project directive

Most challenging aspect of this coaching experience: Taking a following rather than leading role – in one way I am leading, but mostly I follow

How I will use my experience from eCTC in my professional work: This is the work I want to do – coaching, whether it be teams or as a teacher coaching students.

Lessons learned:

See above © Seriously, I am moving into more conscious incompetence – I didn’t realise how much I relied on external structures in my previous work. Although this has more potential to ‘fail’, I can also see how it could be way more sustainable in the long run.

At The End of the Day…

• Patient care is only as good as the care that is delivered by frontline staff.
• The “front line staff” are in places where patients, families and care teams meet which we call Clinical Microsystems
• Team Coaching can help lead improvement teams learn improvement knowledge and skills and engage leaders