The Art and Science of Coaching Interdisciplinary Health Care Professionals in Improvement

International Clinical Microsystem Festival
Marjorie M Godfrey, MS, RN
Anette Nilsson
10:15-11:15
Jönköping, Sweden
March 2011

What is Coaching Health Care Improvement?
Turn to your neighbor and discuss
Coaching
"Evoking Excellence in Others"
James Flaherty

"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

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

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

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.”

You will gain confidence in your own capacity to be an effective coach, that your microsystem mesosystem and macrosystem need desperately in today’s changing health care environment
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.

Edgar Schein, Helping, 2009

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.

The Coaching Model

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<tr>
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Pre-Phase

- Set expectations
  - Leader of coach
  - Coach of Leader
  - Coach + Leader of Team
- Leadership discussions
- Clarity of aim
- Prior improvement experience
- Preliminary system review—Macro/Meso/Microsystems
- Resources
- Logistics

Action Period

Art and Science of Coaching

- Active coaching
- Expectations
- Clarity and aims/goals
- Keep on track
- Group dynamics—new skills
- Task oriented (key to start change)

- Reframing/Different perspectives
- Knowing When
- Encouragement
- Easy availability and access
- Timely responses
- More directive specific to process
Transition Phase

Review and Reflect on Journey
• what to keep doing
• what to be sure and not do again
Assess group capability and coach needs
Reflection, celebration
Re-energize for next focus
Everyone in the game

Transition Assessment Tools (Indiv & Group)
• improvement skills
• meeting skills
• coaching plan
• Assessment of Coaching

Coaching Intensity Over Time

<table>
<thead>
<tr>
<th>MONTHS</th>
<th>INTENSITY</th>
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<tbody>
<tr>
<td>3</td>
<td>High</td>
</tr>
<tr>
<td>6</td>
<td></td>
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<td>18</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Low</td>
</tr>
</tbody>
</table>
The Coaching Model Over Time
Pre-Phase, Action Phase, Transition Phase

Action Phase
The Art Of Coaching

1. Knowing When
2. Reframing
3. Solution Focus Coaching
1. Knowing When

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

INTENSITY
High

Low

3 6 9 12 MONTHS

Always....

2. Reframing Communication Techniques
Reframing

• By reframing a situation or context, another meaning or another sense is assigned thus seeing a situation in another frame.
• A frame can refer to a belief-what limits our view of the world.
• If we *let this limiting belief go*, new conceptions and interpretation possibilities can develop.
How the Way We Talk Can Change the Way we Work
Robert Kegan/Lisa Laskow Lahey

- Leading inevitably involves trying to effect significant changes
- It is very hard to bring about significant changes in any human group without changes in individual behaviors
- It is very hard to sustain significant changes in behavior without significant changes in individuals’ underlying meanings that may give rise to their behaviors
- It is very hard to lead on behalf of other people’s changes in their underlying ways of making meaning without considering the possibility that we ourselves must also change

Mental Model for Personal Learning

- From the language of complaint to the language of commitment
- From the language of blame to the language of personal responsibility
- From the language of “new Year’s resolutions” to the language of competing commitments
- From the language of big assumptions that hold us to the language of assumptions that we hold

New language transforms customary interpersonal, social, or organizational arrangement into a novel form, both to support smooth operation of the new technology and to make it continuously improvable:

- From the language of prizes and praising to the language of ongoing regard
- From the language of rules and policies to the language of public agreement
- From the language of constructive criticism to the language of deconstructive criticism
Different “lenses” for Exploring a Microsystem

- Biologic
- Sociologic
- Mechanical / Physical
- Psychological
- Economic
- Political
- Anthropologic
- Information

3. Solution Focus Coaching

- Coaching agreement
- Resource, building a platform of trust and confidence
- The perfect future
- Scaling, what brought us to that?
- Clues, treasures forerunners already there?
- Which situations in the past contained at least a small piece of your preferred future?
- The action plan

Source: Nicoline Wackerberg
When to Use

Cause - effect analyses and "5 Why" are very popular in many situations such questions are very useful and appropriate:

They are appropriate in situations which can be treated based on models of natural science or technological model like computer systems or the human body seen as a biological system with quite good “calculable” cause and effect dependencies.

To work in such situation without cause – effect analyses would be very awkward.

Example: If the engine in your car does not work it is not helpful to ask:
“On a scale from 0 to 10: How good is the car working?”
“about 2”
“What makes it a 2 and not a 1?”
“Well, I can sit in the car and close the doors”
By asking such questions you will not find a way to make the engine work.
It is better to analyse the functions of the engine to find the cause of the problem.

Source: Nicoline Wackerberg
Interdisciplinary Teams & Coaching

- Key to successful activation, engagement and development of each and every professional in these interdisciplinary teams is disciplined methodologies and a “coach” to guide, reinforce and direct interdisciplinary professionals to new levels of performance.

Coaching, Advising, Facilitating...

... 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.
Dartmouth Microsystem Improvement Curriculum

Fishbones

Specific Aim
Global Aim
Theme
Assessment

Change Ideas
Measures
PDSA

Flowcharts

Meeting Skills/Group Dynamics

Recommended Books

QUALITY BY DESIGN
A Clinical Microsystems Approach

TEAM HANDBOOK
Third Edition

Eugene C. Nelson, Paul B. Balis, Marjorie M. Geoffrey

3/7/2011
Learning To Work Together
The Team Handbook

Internet worksheets

A "little disclaimer…"

Quality Improvement is NOT Tools and Methods
Help us to WORK on the Work

Coaching

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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

Coaching Outcomes

1. Long-Term Excellent Performance
2. Self-Correction
3. Self-Generation
Coaching Experiences

- Group time to review worksheets and exercises
- Additional information, ideas, concepts and experiences in the group
- Direct application of coaching in your designated microsystem with expert reflection, advice and support

A Coaching Model

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Coaching Intensity Over Time

Microsystems Developmental Journey: The Stages

1. Create awareness of flow of work and interdependencies
2. Test some changes to address some of the “embarrassing stuff”
3. See ourselves as a system of care
4. Respond to strategic challenges and invitations
5. Measure performance
6. Learn to integrate multiple improvement cycles while taking care of patients
7. Unending curiosity about and pursuit of “best known” world class processes and outcomes
Coaching From A Swedish Perspective

"The true discovery trip consists not in seeking new horizons and places without seeing it old with new eyes"

Marcel Proust

3:25-4:15 Anette

Who are we here for?

We are here to increase value for our inhabitants...
Coaching within the microsystem

Employees – make their day!

Coaching microsystem from different areas from an "outside perspective"
FAMNA—make his day!

Coaching the coaches

IDEAS
- Concrete ideas about how something could be better. Inspiration from good example
- Methods and tools

EXECUTION
- Go from word to action
- Measure results and make it visible
Learning by doing journey...

I have the opportunity to be involved in Marjorie Godfrey’s interactive research by testing her model and...

Coaching & Interactive Research

I am so excited ...and want to share some thoughts with you

- I still believe coaching is about building trustful relationships, release energy, create hope and a structure to go from words to action and follow up this.

- In Marjorie’s model I have learned the importance of doing deeper pre work before we start our study circle with team from different context.

- I believe there could be a “coaching agenda” where we know which ingredients will be involved

- I have reflect on the importance of respect between the researcher and practitioner where we both are from our different perspective- can see benefits

- I have reflect on the importance of having the focus both from the researcher and practitioner on the value for the customer – it’s not about Marjorie and Anette it is about a value for someone else
I also have reflected on the importance of my own thinking when I develop new knowledge. My thinking model is that I have a lot of experiences and life is a lifelong journey. Every day I have something new to learn.

Marjorie’s coaching model will give me new knowledge as I will embody in my earlier experiences and develop me as a coach.

Why do I tell you this? ...

I believe curiosity and to be humble is important when you want to act to be a good coach. Sometimes I meet people and they tell me you know I know I have been doing this for soooo long time..they see themself as expert and have nothing more to learn.

For me life is so much more exiting when I think I have something to learn from every people I meet! And when you are interested in other people they will look at you as a interesting person.

Pre-Phase

1) Ask your self about your drive forces? What is most important for you to feel you are successful?
2) When you know what you dream about to accomplish ask your self what is the key factors?
3) Ask your self what model, methods & tools can be helpful?
4) Then ask your self how to bring all this together with your personal skills?
Pre-Phase...

- My drive forces in coaching is to find a person where he or she is and carefully bring him or her further...(Kirkegaard Danish philosopher) it is when I can give empowerment to another person so they get proud and say I did it...not Anette did it. And when I can see people can continue themselves after my coaching, I feel joy in work.

- My key factors in beliveness are to create good relationships where people feel trust and joy and find a way to make a differens how make them more sucessful.

- I have worked a lot with coachin with all humble and have used different models, tools and methods sporadically from the need based on my experiences but not in a systematic way.

- And I belive as Gandi says "You must be the change you want to see in the world" we need to live our message therefore we can’t just copy a model and bring our toolbox with us we need to find our passion to involve models, tools& methods in our personality and find our way how to make the model to my model. And it is hard to say but you can never learn how to coach a team only by learn about it you must do it in practice and have reflection from your experiences.

Pre-phase..

- Marjories model in a structured way...from now I was James Bond and Marjorie was the person how told me **key coaching actions to do**...this was a challenge for me-I was used to do it my way...

- First meeting with leaders and team to discuss the purpose to participate in the learning series and personal talent to develop during the work.

My reflection:

- My first call I told them how happy I was to have the opportunity to work with just their team...and asked for a meeting at their unit
I believe words are very important...

What words we choose to use... how do we set the table for a good dialogue where trust and joy can grow?

You now the problem is...
I know you have no time -- you need to talk with your manager...
I agree it is terrible and so hard...

Or

You know the challenge is... and isn’t it fantastic you as a nurse can make a difference in your everyday work...
Yes time is hard but you know time is coming new all the time and I believe it is our way of “thinking” about time that determines if we will find time or not...
Tell me what are you proud of in your everyday work... tell me a good story from this week....

Pre-phase...

Meeting with the team and leaders

My reflection:
Be there!!! Show them just now the most important for me is to be with you and I have the time... don’t tell them how busy you are... let them feel you are there for them and you will give them all time they need... even if you know your calendar is very booked.
Be clear. Follow the model talk about the purpose tell them about the first meeting at the learning session and give them the opportunity to feel self confidence. Talk about their aim and how they will feel when they have accomplished it. When it is the last day in the learning series what will make you proud? How to make this happen?
Try to create curiosity and inspiration. Ask questions about their thoughts and stories from their perspective. Tell them again “I am really looking forward to continue this work with you. When does it suit you to meet next week? And try really try to make them feel it is their calendar how is important to start from...
Pre-work is very very important if you want to do good work and if we do the pre-work in a good way we will have a better improvement journey in all perspectives.
**Action Phase**

- Continue to meet with the leaders and teams
- Be available! In person, telephone, email
- Be Timely! Busy people want support now..not in a week
- Encourage them and praise them
- Remind them of their goals
- Help them find help to make reports for the next learning session

---

It is in the meeting between the people the real conditions are created

Everybody wants to feel ”I know, I can, I will”

Nobody wants to feel ”I don’t know, I can’t and I have no will”

How to help each other to be ”when I am the person when I am the best”

Who helps you in your daily work to be the person when you are as best?

(glimpses from team meetings)
Transition Phase

- Reflect on improvement learned and progress made in reaching goals
- Celebrate!
- Discuss additional coaching needs moving forward

A Coaching Model

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“You can not teach a person anything. You can only help him discover it within himself.

Galileo

Final Questions

Summarize Day
Review Wednesday
Evaluate Day

4:15-4:30 Kathleen
“quality improvement”

The combined and unceasing efforts of everyone – health care professionals, patients and their families, researchers, payers, planners, educators – to make changes that will lead to better patient outcome, better system performance, and better professional development.
Coaching and The Microsystem and the Leader

Coaching Intensity Over Time

![Graph showing the intensity of coaching over time. The intensity decreases from high to low as time progresses from 3 to 24 months.]
## A Coaching Model

### Pre-Phase
- Clarity of aim
- Leadership discussions
- Preliminary system review
- Macro/Meso/Micro systems
- Expectations
- Resources

### Action Period
- Active coaching
- Clarity of aims/goals
  - Keep on track!
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### Transition
- Review and reflect on journey
  - What to keep doing
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  - Assess capability and coach needs
  - Reflection, celebration
  - Re-energize for next focus

## Coaching and Outcomes

### Coaching Model
- **Pre-Phase**
  - Clarity of aim leadership discussions
  - Preliminary system review
  - Expectations
  - Resources

- **Action Period**
  - Active coaching
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    - What to be sure and not do again
    - Assess capability and coach needs
    - Reflection, celebration
    - Re-energize for next focus

### Coaching and Outcomes
- **High Performance**
- **Self Correcting**
- **Self Generating**
Flaherty

- Coaching Outcomes
  - **Long Term Excellence Performance**
    - High objective standards of the discipline
    - Can be observed
  - **Self-correction**
    - Observe when they are performing well and when they are not and will make adjustments independent of the coach
    - (Coaching should work to build competence)
  - **Self-generating**
    - Know they can always improve and will continue to find ways to do this on their own.
    - They will practice more, observe others, or learn new knowledge/activities to improve competence

The Essence of Leaders

- *Educe* \eh-duse\ A marvelous word seldom used or practiced, meaning, “to bring or draw forth something already present in a latent, or undeveloped form.”
- Contrast with *induce* “To prevail upon; move by persuasion or influence- to impel, incite, or urge”

*One From Many*

~ Dee Hock
How Might Leaders Benefit From Coaching?

- Set clear expectations of coaching, staff and self
- Move from “command and control” to a leadership style of inquiry and support
- Use inquiry, data and identification of patterns to support front line staff
- Hold staff accountable to identified goals and targets
- Encouragement of staff through words and actions (time to do improvement & identification of physical space to post data wall and improvement tools)
- Notice staff efforts and successes
- Facilitate resources for the improvement group
- “Block & Tackle” systems within Bartlett Regional Hospital
- Share stories with other leaders
- Inquire about progress
- Expect data over time
- Explore opportunities for staff to share results
- Expect patient and family involvement
- Become comfortable and practice new leadership style

Resources to Support You

- Quality By Design
  – Leading Microsystems (Chapter 3)
  – Leading Macrosystems and Mesosystems for Microsystem Peak Performance (Chapter 4)
  – Developing Professionals and Improving Worklife (Chapter 5)
### Meet Regularly with Microsystem Leader

**Before weekly improvement meeting**
- Review progress
- Discuss “stuck points”
- Review agenda for weekly meeting
- Review overall timeline (Gantt Chart) for improvement to think short and long term
- Encourage Leader inquiry and praise of group

**After weekly improvement meeting**
- Debrief on meeting
- Review action plan
- Discuss potential challenges
- Acknowledge individual actions and progress
- Review next meeting agenda
- Discuss and listen to leader concerns
- Ask “What else can I do to be helpful?”

### Your Coaching Journal

- **Personal Coaching Autobiography**
- **Reflections, Tips, Questions, Resources**
- **Make notes of key points to remind yourself of the important tips, processes and methods to keep you at the top your game**
The Art and Science of Coaching Interdisciplinary Health Care Groups to Achieve Strategic Health Care Outcomes

Coaching the development of interdisciplinary front line clinical groups to continuously improve health care

Marjorie M. Godfrey, MS, RN, PhD student1, Gerd Ahlström, DMS, Professor1. Boel Anderson-Gåre, MD, PhD2, Eugene C. Nelson, DSc, MPH3, Göran Henriks 2,4 Anette Nilsson 4
School of Health Sciences, Jönköping University, Sweden1, Jönköping County Council2, Dartmouth Medical School3, Qulturum4

Aim: Through Interactive Research explore the intervention of “coaching” of front line interdisciplinary clinical groups to determine impact and benefits related to improved interdisciplinary group dynamics, individual improvement skills, and achievement of desired improvement

Current Research
Empirical studies based on the theoretical framework of the Batalden, Davidoff Improvement equation provides the structure to explore the CONTEXT and EXECUTION of improvement in front line groups to achieve strategic health care outcomes.

Study #4:
This Swedish based interactive research study (February-June 2010) aims to test a novel coaching intervention based on studies 1, 2, 3 and analyze if the coaching intervention impacts individual skills, group dynamics and improvement results for interdisciplinary clinical groups involved in a multi-site learning collaborative aimed to improve safety in Jönköping, Sweden.

Method:
A Mixed Method Model “usual” and “test” design will be used to evaluate the coaching experience of interdisciplinary teams, and the measured results achieved by the groups with and without the coaching model. (Total groups= 7. Randomized coaching assigned to 3 groups)

Important lessons and insights related to interaction research and the role and function of the researcher and the clinical partners include: Mutual respect of each others professional domain (research and clinical practice), identification of key contacts and collaborators, regular meetings and communications, check lists and repeated clarification of goals and expectations, clear focus on the interactive research to benefit patients.

Contacts
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Anette Nilsson
Anette.Nilsson@lj.se

Effect in different ways of training

Source: Dr B. Joyce and Dr B. Showers
BMJ 1997

<table>
<thead>
<tr>
<th>Ways of training</th>
<th>Understand material (knowledge)</th>
<th>Possibility to demonstrate new tools and concepts (SKILLS)</th>
<th>Possibility to adapt in a new situation (use)</th>
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<tbody>
<tr>
<td>Present/Transfer information</td>
<td>80%</td>
<td>10%</td>
<td>0%</td>
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<tr>
<td>Demonstration/Modelling</td>
<td>100%</td>
<td>30%</td>
<td>0%</td>
</tr>
<tr>
<td>Practice</td>
<td>100%</td>
<td>70%</td>
<td>20%</td>
</tr>
<tr>
<td>Practice within application area</td>
<td>100%</td>
<td>90%</td>
<td>50%</td>
</tr>
<tr>
<td>Coach/Report/Give strength</td>
<td>100%</td>
<td>100%</td>
<td>80%</td>
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Improvement Coaches

Coaches *convey* interdisciplinary health care professionals through their learning journey of the art and science of improvement in health care.

- The science of:
  - Improvement, Leadership, Organizational development, Systems, Psychology of Change, Knowledge of Variation, Groups
- The art of: Combining science, change and personal and group development, and helping

• Coaching the changes that are needed in health care may be one of the most important jobs today
• Coach is concerned about:
  - Technical knowledge
  - System knowledge
  - Developing and testing of change
  - Development of the person
  - Development of the interdisciplinary team
A Coach is Concerned...

• About results
  – How the organization functions
  – Integrating knowledge of science of improvement and personal development
• About the people
• About the “context” (microsystem)
• About the processes and systems
• About personal/professional development

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
Underestimate Benefit

• Leaders underestimate potential benefits of providing coaching assistance to their teams.
• Leaders do not coach their teams because they do not know how to do so

Learning Helpers

“Facilitators can help organizations manage change by assuming responsibility for demanding tasks related to improvement work, developing specialized skill and extensive experience regarding improvement, and transferring insights across the organization, while using a learning approach throughout including to their own work.”

Johan Thor, et al, Q Manage Health Care
2004
Helper

- 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

Edgar Schein

*Helping*

2009

---

Helping

- Process that underlies cooperation, collaboration and many forms of altruistic behavior.
Coaching is based on the Socratic principle that you can never really teach a person something, they must learn it for themselves. It is about helping employees to increase their awareness and their responsibility. To coach successfully we have to adopt a more optimistic view than usual and set learning in focus.
“A coach has a most powerful influence on those he or she leads, perhaps more than anyone outside of the family. Therefore, it is the obligation of that coach to treat such responsibility as a grave concern.”

John Wooden
UCLA Basketball Coach

Early “Coachee” Feedback

- Knowledge
- Encouragement
- Availability/Access
- Timely responses
- Emails
- Phone calls
- Essential to “know the context”
  – Visit the site
Coachee Feedback

• Discipline, Rhythm, Pace- “kept us on track”
• “Provided appropriate support and guidance throughout the site visit planning and visit.”
• “Very organized and insightful.”
• “Kept the group together and focused!”
• “Without active involvement of coaches...groups will not be productive...our coaches have been effective and productive. They are good leaders.”

Coaching

• “…has had impact mainly in the area of challenging the way we think about improvement and keeping us informed on new methodologies.”
• “…has helped us to stay focused on the task at hand and not get distracted by the other issues that might be going on. The coaches always brought a different perspective to the table, and made us think about things in a different way.”
The working relationship between the coach and coachee appears to be a key process variable

Coaches

- “Cause us to want better things for our unit.”
- “Tremendous benefits to keep the group focused, energized, moving forward, pushing for outcomes, generating creativity, pressuring involvement.”
- “Keeping us focused on our improvement work and always being available to clarify and guide us.”
Knowing When
The Dichotomy of Action

• Push vs Pull
• Ask vs Tell
• On Stage vs Back Stage
• Watch vs Show
• Hands On vs Hands Off
• Listen vs Talk
• ? Others

Reflection becomes the key
We talk about three types:
• Self reflection
• Reflections through dialogues and with others
• Reflections through scientific resources that is connected to the area that is in focus
Reflection

• It is through the task-based learning situations in daily practice that most learning can be developed, not by problem solving of well known situations, instead you need new questions and challenges
• The Coach has to develop room and space for reflection

Coaching Preparation

• Programs
• Resources
• Tools
• Network
• Coach Credentials
Coach The Coach

Events

New Coach The Coach Format!

Reflecting changing learning environments and new knowledge and information about “teaching” interdisciplinary clinical teams to achieve strategic health care outcomes, we have designed a new Coach The Coach Format.

2010 Spring Coach The Coach
Session #1 Web Conference February 5, 2010 8am-2pm
Session #2 Web Conference March 23, 23, 24, 2010
Session #3 Web Conference April 29, 2010 10am-3pm
Session #4 Web Conference May 27, 2010 10am-2pm
Session #5 Web Conference September 9, 2010 10am-2pm

2010 Fall Coach The Coach
Session #1 Friday September 10th Addie Connect
Session #2 On Site of Lake Mary October 13, 14, 15
Session #3 Thursday November 18th Addie Connect
Session #4 Thursday/December 16th Addie Connect
Session #5 Thursday January 13th Addie Connect

Integrating Chronic Care and Business Strategies in the Safety Net:
A PRACTICE COACHING MANUAL

Written by Katie Goldman, Marjorie Pearson, and Sherry Wu
Edited by Cindy Jonah

Prepared for Agency for Healthcare Research and Quality
U.S. Department of Health and Human Services
501 Gateway Road, Rockville, MD 20850 | April 2009 | www.ahrq.gov

Contract No./Assignment No.: HS1672006000171
Coach Tools

- The CliffNotes
- Meeting cards
- PACE document
- Transition Planning
- Appreciative Inquiry resources
- Ownership vs Buy-In
- Coach Playbook (journal)
- Meeting bags

Microsystem Cliff Notes

Developed by Microsystem Members for Microsystem Members

www.clinicalmicrosystem.org

WORD and PDF Formats
• The benefits of using “gadgets” are almost as numerous as the ways we can use them.
  – Create a relaxed playful mindset.
  – Engage the whole brain -- discussions are left-brained.
  – Tap into the creative right side.
  – Versatility -- they can be used for stress relief, games, team selection, and reinforcement.(time keeper)
  – Encourage participation -- people can't keep their hands off them!
Coaching Models

• Some models to consider
  – Coaching Intensity

• Important considerations to coaching
  – Pre Phase
    • Expectations
    • PACE discussion
  – Action Period
    • Site Visit
  – Transition
    • Reflection

• Evaluation/Feedback for coaches
“The Work Before the Work”

- Preparation for your coaching
  - Special consideration of the clinical team
  - Time with the clinical leaders
  - Role model behaviors
- Role to support “transport” the interdisciplinary team in developmental improvement journey
- Learn about the unique characteristics of the clinical team you are to coach
- Day, time and place to meet regularly
  - Effective Meeting Skills
  - Ground Rules
  - Communication Strategy

Consider

<table>
<thead>
<tr>
<th>Pre-Phase</th>
<th>Action Period</th>
<th>Transition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clarity of aim</td>
<td>Active coaching</td>
<td>Review and reflect on journey</td>
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<td>Leadership</td>
<td>-Expectations</td>
<td>-What to keep doing</td>
</tr>
<tr>
<td>discussions</td>
<td>-Clarity and aims/goals</td>
<td>-What to be sure and not do again</td>
</tr>
<tr>
<td>Preliminary system review</td>
<td>-Group dynamics-new skills</td>
<td>-Assess capability and coach needs</td>
</tr>
<tr>
<td>Expectations</td>
<td>-Task oriented (key to start change)</td>
<td>-Re-energize for next focus</td>
</tr>
<tr>
<td>Resources</td>
<td>-Encouragement</td>
<td></td>
</tr>
<tr>
<td></td>
<td>-More directive specific to process</td>
<td></td>
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<tr>
<td></td>
<td>-Reflection, celebration</td>
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</tr>
</tbody>
</table>
### The PACE of Clinical Microsystem Development and Improvement

**Aim:** Discuss known activities and events to strategize PACE for the development and improvement journey

#### The Journey

<table>
<thead>
<tr>
<th>Pre-Phase</th>
<th>LS 1</th>
<th>LS 2</th>
<th>LS 3</th>
<th>LS 4</th>
<th>LS 5</th>
<th>LS 6</th>
<th>Transition</th>
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</table>

<table>
<thead>
<tr>
<th>Months</th>
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</table>

#### Known Activities

- Joint Commission
- Competency Training
- Vacations

#### Actions

- Continue weekly meetings
- Coordinate all sessions
- Avoid new POSA in Aug
- Keep leaders updated
Action Phase

- Learning Sessions
- Reflections
- Conference Calls
- Easy and timely access and responses
- Site Visit (Know the context)

### Personal Meeting Skills - Detailed

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Never</th>
<th>Occasionally</th>
<th>Often</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Engage a colleague for a group to落实, or a contact for interpreting the task.</td>
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<tr>
<td>2. Engage a new team, new activity, new problem, or a new context of action.</td>
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<tr>
<td>3. Attempt to bring the group back to the agenda when getting off track.</td>
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<tr>
<td>4. Engage when there is group conflict, the group needs an evaluation, or when the group is working very closely together.</td>
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<tr>
<td>5. Periodically engage when goals, problems, or opportunities in our change process appear to be misspoken or misleading.</td>
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<tr>
<td>6. Establish an open line with everyone's consent, clarification.</td>
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<tr>
<td>7. Engage numerous people to contact and bring to meetings.</td>
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<tr>
<td>8. Express the reasons behind any opinion.</td>
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<td>9. Take others for information and opinions.</td>
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<tr>
<td>10. I pay for the obvious and indirect implications of facts and opinions.</td>
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<tr>
<td>11. I think and present alternatives between facts and opinions.</td>
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<tr>
<td>12. Look at a particular problem for the consequences, what needs were not to lead blunder or unrealistic conclusion.</td>
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<tr>
<td>13. I relate my comments to previous contributions.</td>
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<tr>
<td>14. I express my agreement or disagreement, when appropriate.</td>
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<tr>
<td>15. I feel the sense of group agreement or disagreement, the team being disembarked, or the obstacles being made.</td>
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<tr>
<td>16. I maintain the progress of the group and results.</td>
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<tr>
<td>17. I encourage other members to participate and try to make them feel comfortable.</td>
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<tr>
<td>18. I approach others when I think their point of view is important.</td>
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<tr>
<td>19. I try to put off agreements to conflicting points of view and try to address the areas of agreement, “These are our important activities so let us continue the activities we have agreed on X, Y, and Z.”</td>
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<tr>
<td>20. I use appropriate language to reflect ideas in the group.</td>
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<tr>
<td>21. I focus attentiveness to other’s ideas and contributions.</td>
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<tr>
<td>22. I use appropriate gestures.</td>
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</tr>
</tbody>
</table>
## Team Improvement Skills Assessment

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>With Coach</th>
<th>Never</th>
<th>Unconvincingly</th>
<th>Most of the Time</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly/2-way meetings</td>
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<tr>
<td>Effective</td>
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<tr>
<td>Decision Making</td>
<td></td>
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<tr>
<td>Pro-Active Approach</td>
<td></td>
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<tr>
<td>Continuous Improvement</td>
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<tr>
<td>FMEA</td>
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<tr>
<td>Root Cause Analysis and Brainstorming</td>
<td></td>
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</tr>
<tr>
<td>5-Axis Joint</td>
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<tr>
<td>5S</td>
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<tr>
<td>5MRA</td>
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</tbody>
</table>

**October 17 – 18, 2010 Retreat & Reunion**
<table>
<thead>
<tr>
<th>Week 1</th>
<th>Week 2</th>
<th>Week 3</th>
<th>Week 4</th>
<th>Week 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>Monday</td>
<td>Monday</td>
<td>Monday</td>
<td>Monday</td>
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<tr>
<td>Training</td>
<td>Training</td>
<td>Training</td>
<td>Training</td>
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<tr>
<td>Objective</td>
<td>Objective</td>
<td>Objective</td>
<td>Objective</td>
<td>Objective</td>
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<tr>
<td>Task 1</td>
<td>Task 2</td>
<td>Task 3</td>
<td>Task 4</td>
<td>Task 5</td>
</tr>
<tr>
<td>Description</td>
<td>Description</td>
<td>Description</td>
<td>Description</td>
<td>Description</td>
</tr>
<tr>
<td>Task 1</td>
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</tr>
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<td>Description</td>
<td>Description</td>
<td>Description</td>
<td>Description</td>
<td>Description</td>
</tr>
</tbody>
</table>

**Coach Transition Plan**

**Coach Credentials and Portfolio**
• Knowledge
• Encouragement
• Availability/Access
• Timely responses
• Emails
• Phone calls
• Essential to “know the context”
  – Visit the site

• Discipline, Rhythm, Pace- “kept us on track”
• “Provided appropriate support and guidance throughout the site visit planning and visit.”
• “Very organized and insightful.”
• “Kept the group together and focused!”
• “Without active involvement of coaches...groups will not be productive...our coaches have been effective and productive.”
• “Cause us to want better things for our unit.”
• “Tremendous benefits to keep the group focused, energized, moving forward, pushing for outcomes, generating creativity, pressuring involvement.”
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• “…has had impact mainly in the area of challenging the way we think about improvement and keeping us informed on new methodologies.”
• “…has helped us to stay focused on the task at hand and not get distracted by the other issues that might be going on. The coaches always brought a different perspective to the table, and made us think about things in a different way.”
• “It was much easier to physically be there. By physically being there and meeting face to face, by doing the site visits that we ... physically located and what the other supportive services were for me it was to physically be there.”

• “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.”

• “I think one of the key pieces of success was the teams had a trust that we had something for them... we were knowledgeable about what they were trying to do... we knew something about quality improvement and could translate for them... available and helpful when they needed us... being responsive when they needed something for us”
• “Gain the **confidence** in what I do.”

• “Influenced by being a **role model** somebody I can look up and **emulate**- try to be and be as good as that person.”

• “There is nothing like a **face to face relationship**, you knew that the person was totally **devoted to you** at your facility.”

• “**Being there**, being an expert and being able to **bounce ideas** off”

• “**Knowledge of unit and context** is essential for a coach.”

---

The working relationship between the coach and coachee appears to be a key process variable.
• 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
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  – What any recipient must do to facilitate the process

Edgar Schein *Helping* 2009

---

**Helping**

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

...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.

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.”

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Underestimate Benefit

- Leaders underestimate potential benefits of providing coaching assistance to their teams.
- Leaders do not coach their teams because they do not know how to do so.

“Facilitators can help organizations manage change by assuming responsibility for demanding tasks related to improvement work, developing specialized skill and extensive experience regarding improvement, and transferring insights across the organization, while using a learning approach throughout including to their own work.”

Johan Thor, et al, Q Manage Health Care
2004
Teaching and Coaching

- The activities of educating or instructing; activities that impart knowledge or skill;
- The particular message or curriculum that is taught

From knowledge, skill to habits

Figure 10.4. Kolb’s Experiential Learning Model
Used with Permission from Kolb, 

Stories help link the model
After David Kolb
"...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 Model

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<thead>
<tr>
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<td>-More directive specific to process</td>
<td>-Re-energize for next focus</td>
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Laura Hibbs, 2008
Coaching Model

Pre-Phase
- Clarity of aim
- Leadership discussions
- Preliminary system review
- Expectations
- Resources
- Logistics

Action Period
- Active coaching
  - Clarity and aims/goals
  - Group dynamics-new skills
  - Task oriented (key to start change)
  - Encouragement/Praise
  - Reinforcement
  - More directive specific to process

Transition
- Review and reflect on journey
- What to keep doing
- What to be sure and not do again
- Assess capability and coaching needs
- Reflection, celebration
- Re-energize for next focus
• Determine with leadership the clinical microsystem to focus on
• Meet with microsystem leadership
• Determine interdisciplinary team membership
• Convene lead improvement team for first meeting to determine regular day, time and place to meet, ground rules and communication strategy using effective meeting skills

The PACE of Clinical Microsystem Development and Improvement

Aim: Discuss known activities and events to strategize PACE for the development and improvement journey

<table>
<thead>
<tr>
<th>The Journey</th>
<th>Pre-Phase</th>
<th>LS 1</th>
<th>LS 2</th>
<th>LS 3</th>
<th>LS 4</th>
<th>LS 5</th>
<th>LS 6</th>
<th>Transition</th>
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<table>
<thead>
<tr>
<th>Months</th>
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</thead>
</table>

Known Activities

Actions
Coaching Model

**Pre-Phase**
- Clarity of aim
- Leadership discussions
- Preliminary system review
- Expectations
  - Resources
  - Logistics

**Action Period**
- Active coaching
  - Clarity and aims/goals
  - Group dynamics-new skills
  - Task oriented (key to start change)
  - Encouragement/Praise
  - Reinforcement
  - More directive specific to process

**Transition**
- Review and reflect on journey
- What to keep doing
- What to be sure and not do again
- Assess capability and coaching needs
- Reflection, celebration
- Re-energize for next focus
### Personal Interpersonal Skills Assessment

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Never</th>
<th>Occasionally</th>
<th>Most of the Time</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I suggest a procedure for the group to follow, as a method for accomplishing the task.</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>2. I suggest a new idea, new method, new problem, or a new avenue of action.</td>
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<tr>
<td>3. I suggest that the group work to another agenda, with different ideas, or different people.</td>
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<tr>
<td>4. I suggest, when there is more than one solution, that the group consider an idea that is the most effective.</td>
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<tr>
<td>5. I suggest that the group make a priority list, with things that are important or that need to be done.</td>
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<tr>
<td>6. I express an opinion with courtesy and tact.</td>
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<tr>
<td>7. I present my comments without elements.</td>
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<tr>
<td>8. I ask others for information and solutions.</td>
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<tr>
<td>9. I see the significance of other opinions, respecting others' opinions.</td>
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<tr>
<td>10. I read and print out relationships between facts and opinions.</td>
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<tr>
<td>11. I avoid an argument, and explain the reasoning or the facts that might lead me to conclude a particular conclusion.</td>
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<tr>
<td>12. I avoid any comments to pander to others.</td>
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<tr>
<td>13. I foster support and cooperation among group members.</td>
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<tr>
<td>14. I foster understanding and advice about group members, the issues being discussed, or the decision-making needs.</td>
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<tr>
<td>15. I encourage the group to avoid conflict.</td>
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<td>16. I encourage other members to participate and try to noncritically involve others.</td>
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<td>17. I encourage others when I feel their ideas are important.</td>
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<td>18. I try to understand other members of the group, trying to explain their reasoning or the facts that might lead me to conclude a particular conclusion.</td>
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<td>20. I try to understand other members of the group, trying to explain their reasoning or the facts that might lead me to conclude a particular conclusion.</td>
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### Team Improvement Skills Assessment

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<td>Flexibility</td>
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<td>Overall Change Ideas and New Directions</td>
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<td>Data</td>
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<td>Report to Senior Leader</td>
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</table>
# Coaching Health Care Improvement Field Notes

AnnMarie Hess
Coaching Model

Pre-Phase

- Clarity of aim
- Leadership discussions
- Preliminary system review
- Expectations
- Resources
- Logistics

Action Period

- Active coaching
  - Clarity and aims/goals
  - Group dynamics-new skills
  - Task oriented (key to start change)
  - Encouragement/Praise
  -- Reinforcement
- More directive specific to process

Transition

- Review and reflect on journey
- What to keep doing
- What to be sure and not do again
- Assess capability and coaching needs
  - Reflection, celebration
  - Re-energize for next focus

Coaching Health Care Improvement

Marjorie M Godfrey
Qulturum
October 25, 2010
Overview

• Coaching background
• Successful Coaching
• How coaches make a difference
• The work of coaching
• Process of group communication to coach
• Coaching feedback
• Challenges in coaching
• Leadership impact in coaching
• Struggling Teams and coaching actions
• What helps you grow as a coach
• Some considerations

Coaches
n=8/12

• Experience: 4 -10 years
  – Types: Study Circles, General Education, coaching interdisciplinary professionals in daily work in prior role, leadership, Passion for Life, older people, private companies, local, regional, national and internationally, Värnamo quality improvement, private experience with young people, theater, choir, band, soccer coach, Esther Improvement coaching, training other coaches, consultation with hospitals and improvement courses. QUL Examiner.
• Background: Biomedical Scientist, Anesthesia nurse, Nursing Assistant, Nursing Leader
• Formal coaching education: None, found my own way- learning coaching together informally, maybe 1-2 days in prior role, learning from the Qulturum network. Mentoring from professional coaches. One year of studies of organization and leadership (x2).
• Coaching Structure:
  Alone= 50%-70%
  Partnered= 30%-50%
Process

• All Qulturum coaches (n=12) received an invitation in English to join a focus group discussion on coaching.
• Two focus groups were held and were recorded with permission
  – 4 Qulturum coaches
  – 3 Qulturum coaches
• Discussion held in English
  – An occasional pause in participant conversation due to inability to find an English word was quickly solved by the rest of the group.
  – Some Swedish words were not easily translated into English as acknowledged by the group.
  – The language barrier served as an important “stop” for me to ensure I was interpreting the conversation as they intended. During the discussions, I would pause, summarize and repeat what I had understood to elicit informant validation.

Successful Coaching

• Be there, be present- Be close to the persons
• Curiosity
• Movement: Get from here to there-progression
  – Set the table for best performance
  – Ask questions to get movement
• Relations
  – Build relationships- do activities to get to know each other, who we are, why, rules
• Storytelling
  – Help them and me to understand where they are
  – Find inspiration to find will inside themselves
  – What are you proud of?
  – What do people say?
  – Use their words not mine
• Be patient
• Take care, make them feel important
Successful Coaching

- Improvement
  - Goal setting – Focus on results
  - Help with tools and methods (flowcharts help ask questions)
  - Translate my words to their context
  - DeBono hats to overcome personal values and see things
- Get people to grow in work/situation
  - To get there, you have to be “beside”
  - Hands behind your back
  - Don’t do it for them, be a support
  - Involve them
- Follow up
  - Ask questions to help them see that they do good work
  - How to do better
- See and understand whole system
  - To be a good worker in care, you have to see the whole system and understand the steps before and after
  - Work together for better results
  - It’s about the patient
- Support
- Be humble

How Do You Make A Difference?

- Not to come to group and deliver knowledge
  - Be with the group for awhile and listen to their problems and what they are talking about
  - Be there, be present and talk about their issues
How Do I Work as a Coach?

• Usually with a coaching partner (2 senior coaches)
• Try to spend time with the unit—be very present, almost a member in the group
• Watch relationships of group
  – ? Laughing, comfortable
  – Find someone to start a small conversation
  – “Set the table” to let the leaders know they are in charge and I can help and guide

The Work of Coaching

• Start close to the team in the beginning and ask more.
• “Go to Gemba”
  – Just like soccer: you need to be more active in the beginning and play with the kids. Over time some kids teach other kids.
• When they understand where they are, I step back; use phone calls, give feedback
• More intensive in the beginning.
  – You can feel if they can work by themselves, have a leader in the group.
• Build capacity of the team. Ownership
  – Help them get along by themselves
  – If you don’t understand the basics, you can’t go on.
  – First you have to shout—then build in capacity with captain to steer.
  – They know what to do and when.
  – Same with groups so they can survive without you.
• Involve patients
• I run programs so I have time to talk when we meet and between sessions.
• Send emails to ask if we can help.
• Challenge them a little where they are in their process
How Do Groups Communicate With You?

• They phone
• We follow along on Q –Reflex
  – They write reports and submit other documents so I can follow them
  – If I don’t see any documents, it is a signal for me to call
• Emails
• Videos- we always meet before video

What Have Those You Have Coached Said?

• “We want you in the room, you put so many good questions.”
  – You are useful when you ask questions. Trigger us to think in another way.
• “Don’t come here and talk Qulturum language. You must be concrete.”
  – I listened, took notes and tried to figure out what they are talking about.
  – I then used my knowledge of improvement formula without using the model and the leader said I had a “fantastic” lecture
  – I had only said what they had already said
• “What are we here for?”
  – They don’t feel the understanding of what to do.
Challenges to Coaching

• Teams do not have time for meetings- “So much to do”
  – Maybe phone calls
  – When I am present in meetings they work out good new solutions. Ask questions while discussing topics not give answers to help then find the way.
  – When I am not at meetings, they turn to the old way
• Teams do not have time to work between sessions
• “We can come to you”
• Teams report Qreflex is for “us” and not them to get help. We must discuss to help understand it’s to help one another and the teams.

Challenges and Actions

• They are afraid of trying
  • Try with one nurse, one doctor, one patient
  • Hold focus
  • Try it! Be supportive
  • You know best!
  • Acknowledge attempt followed by new suggestion
  • “I’ve met teams that tried this, what do you think?”
Challenges and Actions

- Coaching over time
  - Sustainability is difficult
  - Beginning is easy
  - End is harder: must have passion
  
  Biggest danger is to take over and be the teacher

Knowing When Phenomena

- Front stage/back stage
- Push vs Pull
- Tell vs Ask
- Observe vs Show

Struggling Team Actions

- Email, phone calls
- We can come and help you
- “Please tell me what the problem is. Helped them build a structure:
  - What do you need to do and who will do it?”
  - Return in two weeks and ask what they did and write it down
  - Use their experience, build pieces, take action
  - Concrete small steps
  - Ask and ask
  - Help to make small steps in a systematic way

- Meet with the manager
- New nurse was added to the group and hadn’t met the coach—she didn’t understand the context and wasn’t prepared—meet new members in advance
- “You don’t understand” from MD
  - Have an expert MD by side answering questions
Leadership

• Increasingly try to spend more time with the leaders before. Discuss how to follow up and how to support. If the leader understands it goes faster. If not, I need to be there more.
• Leaders role is symbolic- “I am here to support you”
• Inconsistent leader involvement.
  – They can create opportunities of meeting points in daily work to share information and build own knowledge
  – It’s important for the unit to see the leader involved
  – Leaders differ from one another: some are more active
  – You should have leader confirmation
  – Coaches don’t always reach out to leaders
• Leaders allow the coach to coach, time to meet to do improvement and offer support and finances

Feedback

• Verbal
  – “It’s fabulous you are here.”
  – Broad feedback and sometimes you find coaching feedback
• Written
  – Sometimes on evaluation forms under “what can get better.”
• We don’t have a dialogue like this. We are training ourselves
• No self evaluation. Some coachee evaluation
• No peer coach evaluation
• Goran evaluates us once a year

• No special process or questions about coaching
• Cultural Consideration
  – It’s not about the person, it’s about the team
  – We are afraid of “its about me”
  – It’s easier to give good, nice feedback
  – Harder to give negative
• Most concrete feedback was from a team in another country.
  – Spontaneous
Feedback Examples

• “We worked with vision, values you said shouldn’t stay on paper. We’ve done so much and worked hard—it was helpful you were with us. It makes a difference.”

• “Don’t talk about sports.”
  — Have to know your audience to pick the right story

• Tough to get reactions from groups who project their feelings
  — Nagging, bullying

“Sometimes we give concrete feedback to each other when we work together. In the film FISH everybody can give and get feedback. I think we can do that at Qulturum.”

What Helps You Grow As a Coach?

• Role Models
  — Göran, Anette and others
  — Anette and Joakim talk in simple not pretentious way you can be who you are.
  — Listen to others
  — Coach each other

• Practice Coaching
  — Coaching with partner

• Many different contexts
  — Connect different perspectives and people

• Discussions like this
• Reading
• Learning new content
  — Organizational cultures
  — Dartmouth theories

• Have an expert by the side to answer questions and learn at the same time when starting
• Prepare myself
• Beginning coaching should use tools and stick to them
Considerations

• Formal Coaching Program with process to partner Senior and Junior Coaches
  – “I think I feel better when I coach with another.”
  – “You can coach each other.”
• Regular time to meet as coaches at Qulturum
  – “Do you have time to get together as coaches?”
    “No, not right now.”
  – “Need more time for coach reflection.”
  – “Need to improve colleague collaboration at Qulturum”
    • Tend to dig deeper into our own individual work
    • We should learn about each other programs instead of only doing our own work
• Process to consistently engage leaders
• Coaching evaluation process
• Keep role modeling the “art” of coaching

I am grateful to you.

Thank you
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."
<table>
<thead>
<tr>
<th>Pre-Phase</th>
<th>Action Period</th>
<th>Transition</th>
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<tbody>
<tr>
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<td>- Encouragement</td>
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<td>- Reframing/Different perspectives</td>
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<tr>
<td></td>
<td>- Easy availability and access</td>
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<td>- Timely responses</td>
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- Clarity of aim
- Expectations, expectations, expectations
- Leadership discussions
- Preliminary system review - Macro/Meso/Microsystems
- Resources
Action Period

- Active coaching
- Expectations
- Clarity and aims/goals
- Keep on track!
- Group dynamics-new skills
- Task oriented (key to start change)
- Knowing When

- Encouragement
- Reframing/Different perspectives
- Easy availability and access
- Timely responses
- More directive specific to process

Review and Reflect on Journey

- what to keep doing
- what to be sure and not do again
Assess capability and coach needs
Reflection, celebration
Re-energize for next focus

Transition Assessment Tools (Indiv & Group)

- improvement skills
- meeting skills
- coaching plan
2 Cohorts

Y/N

CF

"Perspectives"

Coaches

n=5/10

n=4/21

n=10/12

n=31

Leaders

Themes

With and Without Coaching

Safety

Flip of Coin

Coach (3)

Coach (4)

Usual

Variation

Coach

Approach at Dartmouth

Newest

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<table>
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<tr>
<th>Level</th>
<th>Description</th>
<th>Evaluation</th>
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<tr>
<td>One (1-2 yrs)</td>
<td>Completed microsystem coach education and has coached 1 clinical microsystem for 6-12 months.</td>
<td>Evaluation from clinical microsystem members in written format with action plan for coach improvement and continued development. Documentation: Improved interdisciplinary team function and desired improvement outcomes, along with enhanced microsystem leader effectiveness.</td>
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<td>Two (2-3 yrs)</td>
<td>Level 1 Has coached 3-6 microsystems for 12-18 months.</td>
<td>Evaluation same as Level 1 with additional feedback from leaders of the microsystems. Action plan completed for improvement with documented evidence of improvement.</td>
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<tr>
<td>Three (2-4 yrs)</td>
<td>Previous levels, plus coached &gt;6 microsystems and &gt;1 mesosystem. Teaches coaching, coaches other coaches within organizations to create coaching infrastructure Regularly collaborates with organization leadership</td>
<td>Same as previous levels with additional feedback from organization leaders and coaches. Action plan for continued development completed and reviewed semi-annually. Additional documentation includes the implementation of timely, user-friendly two-way communication/information transfer among front line microsystems, mesosystem leaders and macrosystem senior leaders.</td>
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<tr>
<td>Level</td>
<td>Description</td>
<td>Evaluation</td>
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<td>Four (4-6yrs)</td>
<td>Previous levels, plus coaches whole organizations. Regularly contributes to coaching community through active participation in conferences, teaches coaching, web/teleconferences and website contributions, blogs, websites</td>
<td>Same as previous levels with continued feedback from leaders at all levels of the organization and coachees. Developmental plan created and reviewed semi-annually with coach colleagues at same level or above.</td>
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<tr>
<td>5 (5+ yrs)</td>
<td>All previous levels. Is a mentor to coaches. Actively develops coaching network. Publishes coaching manuscripts, presents, and teaches. Develops materials and tools to support coaches.</td>
<td>Same as above. Evidence of sustainability of coaching goals by those coached once the coach transitions forward and continued coach growth and development in the organization.</td>
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Coaching

The POD

Individual Coaches

Site Visits

Clinical Microsystems

eCTC Credentialing

Contact Information
First Name
Middle Initial
Last Name
Degrees
Job Title
Parent Institution
Organization:
Email Address
Phone Number
Mailing Address

Member Information
Member Type
Current eCTC
Academic Affiliation (optional)
General Category of Interest
Specific Area of Microsystem Interest?
<table>
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<th>Evaluations</th>
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<td>Coach Evaluation</td>
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<td>Peer Evaluation</td>
<td>Self Evaluation</td>
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<tr>
<td>Personal Coaching Development Plan</td>
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<th>Supporting Information</th>
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<td>Start Date</td>
<td>End Date</td>
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<tr>
<td>Current Mesystem Being Coached</td>
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<tr>
<td>Start Date</td>
<td>End Date</td>
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<tr>
<td>Mesystem Leaders Being Coached</td>
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<tr>
<td>Start Date</td>
<td>End Date</td>
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<tr>
<td>Macrystem Leaders Being Coached</td>
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<td>Start Date</td>
<td>End Date</td>
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<td>Coaching Network</td>
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<td>Publishing on the web: (eg coaches corner, blogs, websites, etc)</td>
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<td>Teaching/Presentations</td>
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<td>Materials/Tools/Programs</td>
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<td>Mentoring other coaches: (list names / dates)</td>
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