

PROVINCIAL PHYSICIAN QUALITY IMPROVEMENT COACHING PROGRAM

Guidebook for QI Coaches



Table of Contents

Physician QI Coaching Program Overview.....	3
What is it?	3
How does it work?.....	4
Physician QI Coaching Program Core Principles.....	4
Physician QI Coaching Program Goals.....	5
Types of Supportive Relationships	5
Coaching vs Mentoring.....	5
Coaching for Quality Improvement.....	6
QI Coaching Skills.....	6
Building a Coaching Relationship	7
Phases of Coaching.....	7
Establish Relationships	7
Coaching Sessions.....	7
Between Sessions	7
Evaluation & Close.....	7
Effective Coaching Techniques.....	8
Supports & Development for QI Coaches	9
Appendix 1: FAQs	10

Physician QI Coaching Program Overview

What is it?

The Physician Quality Improvement (PQI) Coaching Program is a peer-to-peer coaching program designed to connect quality improvement coaches with physicians who are leading QI projects and/or initiatives within the Joint Clinical Committees (JCCs). Coaches are PQI Level 3 (or equivalent) trained physicians who support the physician project lead (coachee) through regular check-ins and meetings. The collaboration of coaches and coachees ensures that the project is founded on Quality Improvement methodology and is grounded in the Institute for Healthcare Improvement's (IHI) model for improvement and the Quintuple Aim.

The coach will work with the coachee to support designing and implementing a QI project including, but not limited to prioritizing problems and defining aim statements, working effectively in teams, analyzing problems to find root causes, developing indicators and measurement plans, understanding data, developing change ideas, testing and adapting changes, sustainability, spread and publication/presentation. Key roles and responsibilities of the coach include:

- ✓ Understanding the intention of the project and the needs of the coachee
- ✓ Supporting the coachee in using QI methodology, including PDSA cycles and data collection and analysis over time
- ✓ Collaborate to meet coachee goals and overcome barriers
- ✓ Guide and optimize use of QI tools and methods

The most important aspect of being a successful coach is to *“be present, and to be curious”*. Other key attributes of a QI Coach include:

QI EXPERT	RELATIONSHIP BUILDING	COMMUNICATION	FACILITATION
Deep understanding of methodology, tools, and practical application.	Building rapport and trust with peers, non-judgmental interactions.	Active listening, clarifying questions, timely feedback, positive and constructive comments.	Team development, holding productive meetings, decision making processes, conflict resolution.

How does it work?



INTAKE

Physician project leads who require or request a QI coach complete a short intake form online. This establishes the project profile by identifying key criteria such as: QI needs, clinical area of focus or specialty, region/health authority, and availability.



MATCHING

Based on the project profile, a suitable coach will be selected and matched with the lead. PQI Central staff will facilitate the connection and provide resources and templates to maximize the experience of both the coach and coachee.



COACHING

The coaching relationship will be directed by the participants and will vary based on the needs of the coachee. Each coachee is eligible for up to 10 hours of QI coaching per project from a coach.



WRAP UP & EVALUATION

At the end of the coaching relationship, participants complete an evaluation, which contributes to program reporting and improvement. All feedback and evaluation data remains confidential and will only be used for research in aggregate form.



COACH SKILL DEVELOPMENT

All physician QI coaches will receive onboarding and training and will join our QI coach community of practice with access to additional training and resources designed to enhance skills and confidence in QI coaching.

Physician QI Coaching Program Core Principles



The Physician QI Coaching Program is grounded in the science of improvement and utilizes a peer-to-peer coaching approach to impact the IHI Quintuple Aim (improving patient experiences, improving provider experiences, reducing the per capita costs of healthcare, improving health equity, and improving the health of populations overall).

Physician QI Coaching Program Goals

- Establish and grow a network of **experienced and empowered** coaches who are passionate about QI and helping their peers.
- Deliver **high quality**, peer-to-peer QI coaching that is **accessible and flexible**, meeting people where they are at.
- Build **strong coaching relationships** where participants are supported in achieving their goals utilizing a **strong QI foundation**.
- Facilitate **meaningful connections** between QI coaches and coachees through **best practices** in the science of improvement and coaching philosophy.
- Contribute to a **culture of continuous quality improvement** throughout JCC projects and initiatives.
- Create a **supportive community** for QI coaches to advance their QI coaching skills and confidence through additional learning opportunities.

Types of Supportive Relationships

Coaching vs Mentoring¹

Coaching is a structured and goal-oriented process that helps individuals or teams improve their performance, skills, or behavior. A coach is a facilitator who asks powerful questions, provides feedback, and supports the coachee to find their own solutions and actions. Coaching aims to unlock a person's potential and to maximize their own performance [Sir John Whitmore (1992), *Coaching for Performance*].

Mentoring is a long-term and relationship-based process that helps individuals or groups grow and achieve their potential. A mentor shares their knowledge, experience, and wisdom, and offers advice, guidance, and encouragement. Mentoring is usually broad, holistic, and developmental, and can be formal or informal, depending on the goals and expectations of the mentee and the mentor. In a mentoring relationship there is often a power differential with the mentor having advanced knowledge and experience whereas in a peer-to-peer coaching relationship the participants are non-hierarchical and on a more equal playing field.

Both coaching and mentoring aim to help people learn, develop, and succeed. They are based on trust, respect, and confidentiality, and require effective communication, listening, and feedback skills. They also benefit from clear objectives, agreements, and boundaries, and regular evaluation and review. Both coaching and mentoring can enhance motivation, confidence, and performance of the participants, and create positive changes in their personal and professional lives.

¹ LinkedIn Learning 2023

Coaching for Quality Improvement

Quality improvement coaches are skilled in the human side of change and QI measurement and are able to use QI tools and methods to help teams achieve their aims. They coach colleagues to test new ideas and support teams with implementation and spread by providing hands-on support, guidance, and motivation.

QI Coaching Skills²

Strong technical skills in the art and science of QI. At times, coaching morphs into more of a teaching role. Having strong QI knowledge, experience and skills is a prerequisite for QI coaching. Coaches should know when to introduce new and advanced QI concepts to teams. Concepts need to be presented in a simple format and in a manner that is appropriate to the facility where the project is being planned. To be contextual and relevant are the biggest assets of a QI coach.

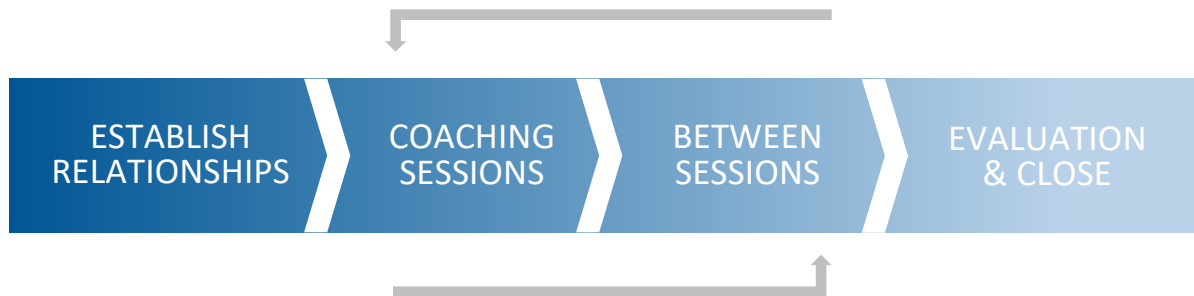
Good interpersonal skills. Coaches need to have effective communication skills, including active listening skills, and awareness of when to ask guided questions to facilitate coachee self-reflection. To be effective, QI coaches should be passionate about QI, possess empathy and compassion, embrace a sense of curiosity, and be able to encourage and motivate teams. QI coaches should have strong facilitation skills, helping to network and connect coachees and QI teams to other QI teams, key partners, and other peers and leaders that may help support the project. They should be committed to creating a culture of improvement.

Ability to develop and carry out a coaching plan. A coaching plan includes the details about how a coach is going to carry out the work with one or multiple QI teams. They need to plan how to remain connected with the coachee and their QI team through regular communication and be comfortable with the logistics required to arrange coaching meetings. Essential stages in the coaching process include the following: developing rapport, doing a deep dive into the QI project to facilitate mutual understanding, goal setting, guided inquiry, feedback, action planning, and creating a mechanism for accountability/continued follow up. The stages are then repeated until the coachee's goals are met.

² Coaching for Quality Improvement: Point of Care Quality Improvement (POCQI)

Building a Coaching Relationship

Phases of Coaching



Establish Relationships

- Get to know the team and the work: establish rapport and trust, review the proposal or project to determine QI needs
- Clarify expectations and boundaries: set meeting frequency and method (in person, phone calls, videoconference), set communication frequency and method (text, email)
- Review roles and responsibilities for coach and coachee, document agreement

Coaching Sessions

- Meet regularly to discuss progress and goals, challenges and obstacles and follow up on required actions
- Set goals and accountability for each session
- Use guided inquiry and feedback to help coachee identify problems to solve, frame challenges, and find solutions together
- Review strategies and commit to an action plan that is coachee driven
- Continue to build trust and rapport

Between Sessions

- Keep record of actions, reflections, and outcomes
- Prepare for upcoming sessions
- Document the results

Evaluation & Close

- Check in on initial plan and goals to ensure objectives have been met
- Reflect on learning: what have you accomplished since we started working together? What are you most proud of? What were your biggest challenges and how did you overcome them?
- What might be the key milestones, successes, and learnings from this project?
- Celebrate the learning that has occurred, acknowledge the hard work and results
- Program evaluation

Effective Coaching Techniques

Set appropriate goals: determine how you will assess progress towards goals (e.g., SMART goals – specific, measurable, achievable, relevant and time bound).

Ask guiding questions to encourage self-reflection:

This helps to facilitate the coachees thought processes to identify solutions and actions rather than taking a directive approach.

Take a positive, non-judgmental approach: Having a positive outlook can help you be a source of support, encouragement, and motivation.

Practice active listening: Observe, listen and ask questions to understand issues that may be influencing the work or environment.

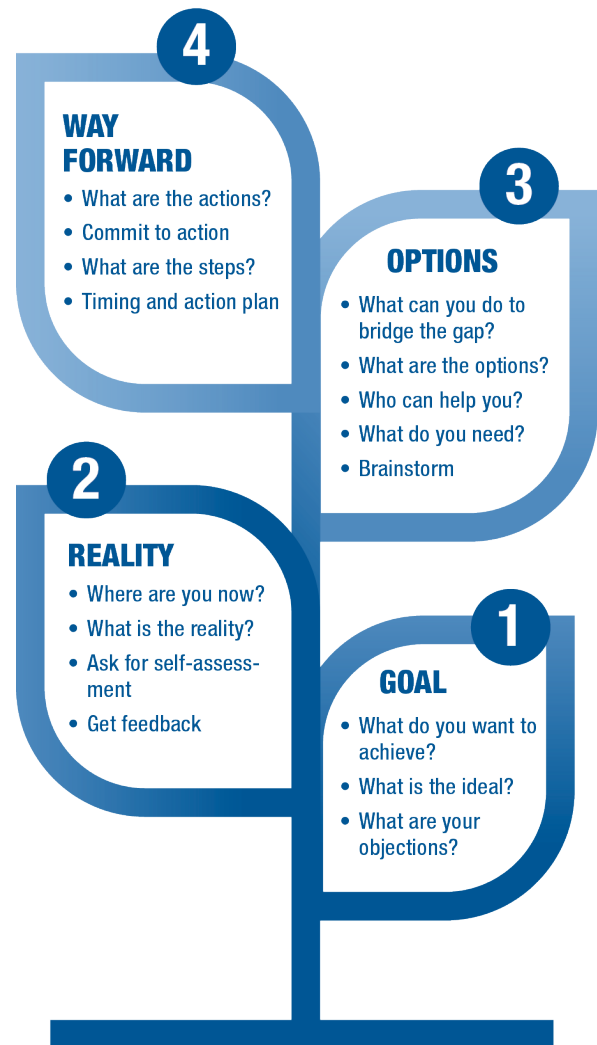
Relationship management: Ensure the coachee receives the appropriate level of coaching at the right time.

Encourage independence: Discourage over-reliance on the coach by building capacity and confidence.

Set expectations for each coaching session: To make sure coaching conversations yield positive changes and results, identify and outline the next steps for each session. Collaborate to develop reasonable expectations that account for their workload and the complexity of the improvement they need to make.

Invest in your own development: Work to improve your own competencies and skills to improve your coaching skills. Ask for feedback from the people you coach to learn about changes they may like to see in your coaching relationship.

Consider the GROW Model



Supports & Development for QI Coaches

Providing opportunities to strengthen coaching skills, confidence, and support ongoing learning is an important aspect of the Physician QI Coaching Program. We welcome all QI coaches to join our virtual community to connect, problem solve, and share resources.

There will be optional monthly check-in calls via Zoom to share learnings, challenges, and generally provide peer support around coaching. These meetings will be facilitated by the Provincial Lead, QI Coaching Program.

Additionally, there are numerous websites, articles, and books that are dedicated to understanding not only the critical role of the coach but how to develop and maximize the unique skills of successful coaches. A key personal trait of good coaches is that they are lifelong learners.

When you are ready to discuss expanding your coaching skills please reach out to Lead, QI Coaching Program, Dr. Jane Lea JLea@providencehealth.bc.ca.

If you are considering a formal course the [Physician Leadership Scholarship Program](#) (co-funded by the Specialist Services Committee and Shared Care Committees) might provide some funding support.

Appendix 1: FAQs

Q1. What happens if I don't 'click' with the coachee?

At the request of either the coach or coachee the agreement may be terminated with no-fault. If this happens, we will find a new coach for the coachee and put the coach back into the coach pool to be considered for a new match.

Q2. What happens if the coachee misses multiple meetings or does not reply to correspondence?

We require that a coaching agreement is in place for all coaching relationships so that expectations are clear. A coaching agreement template is provided in this guidebook.

Q3. How do I get remunerated?

Coaches will fill out a monthly invoice of all coaching hours and corresponding project/s. Invoices should be emailed to quality@doctorsofbc.ca on the first of the month for processing.

Q4. How many different projects can I work on?

Coaching contracts are issued for a maximum of 12 months and may be renewed. In that timeframe coaches may work on one or more projects to a maximum of 10 hours per month total.

Q5. Do I have to be in the same location as my coachee?

If both the coachee and coach agree to it, then the coaching may take place virtually on a mutually agreed upon platform. This should be indicated in the coaching agreement.

Q6. How many hours of consulting are allowed per project?

There is a maximum of 10 hours of coaching allowed per project. If you think your coachee requires more than 10 hours of QI coaching please notify the Provincial Lead, QI Coaching.