

Project Name:

Project Lead:

1. Why?

Quality improvement projects can be rewarding, however, they can also be difficult and you can run into challenges along the way. Talking through the difficulties with someone who has more experience of improvement methodology may help clarify next steps.

2. How?

This template will help guide a coaching conversation to maximise benefit for the person attending and provide structure for the person who is acting as coach. Not all sections are necessary. This template can be used as a guide for staff participating in the National Quality Improvement Team Community of Improvers.

3. A sample agenda for coaching

Sample agenda for coaching, to be customised as needed	Specific tasks
Introduction of the session	<ul style="list-style-type: none"> Introduce participants. Present the agenda of the session. Identify a time keeper and a note taker from the QI team. Describe the objectives of the session and revise them as necessary.
Update on the QI work and progress	<ul style="list-style-type: none"> If the team has developed an improvement charter, ask someone to summarise it and the progress in its implementation. If the team does not have an improvement charter, ask them to describe their progress with the improvement aim and objectives, indicators and changes (planned or introduced).
Identification of issues to address during the coaching visit	<ul style="list-style-type: none"> Ask the team leader to list the priority issues they have, both with the QI process and with the health system that they are addressing. It may be helpful to invite other members to add to this.
Quality assurance of the data	<ul style="list-style-type: none"> Validate the reliability of the improvement indicators through observation of the data collection process by the team for the past month and the data verification. Make corrections if necessary and interpret results and run charts.
Technical assistance to the team	<ul style="list-style-type: none"> Identify and use the relevant coaching tool(s) to help the team address its challenges and move to the next step. Some sample areas may include the analysis of a system or process of care through: flowcharting, root-cause analysis, reviewing the data and constructing a run chart or planning the test of a change. The team may also need guidance on identifying and managing culture change and engagement in QI. For more advanced QI efforts, the focus will be on documenting lessons learned and planning the spread of changes. This is an opportunity to build the capacity of the team.

Planning for next steps	<ul style="list-style-type: none"> Summarise what has been done and learnt during the session. List and prioritise the issues to be addressed. Brainstorm possible solutions and next steps. Plan the implementation of the next steps, including the role of the coach to address the priority issues.
Follow up planning	<ul style="list-style-type: none"> Identify the next communication (email, telephone, etc). Set a date for the next coaching session.

4. Sample coaching questions

Sample coaching questions		
Clarifying and focusing	Probing and enquiring	Solution oriented
<ul style="list-style-type: none"> What's happening? How do you see it? What makes you say that...? What else could explain the situation...? Who will be affected if you do nothing? Who might help you? What obstacles or barriers do you envisage? What the most important (or most difficult) aspect of this for you? 	<ul style="list-style-type: none"> What's the difference between things now and things as you want them? Who else cares about this, as well as you? Who else is affected by it? Can you explain more about...? Who benefits from this now? Can you give an example? What happened... and...? Who are 'they'? How do you feel about this? If you were asked 'where's the evidence for this?' what could you say? What assumptions are you making? Can you tell me how you know that? What would tell you if things were getting worse or better? What would you do differently? 	<ul style="list-style-type: none"> What would success look like here? If all decisions rested on you, what would you do? What are your options now? Which option might appeal most to X or Y? Is there anything about this that you couldn't live with? What other possibilities exist? Where could you find out more about this? Who else might have an interest, could get in your way or could help you? What are you going to do between now and when we next meet? What are you going to do in the next three hours, days, weeks? What's the first step you can take?