Improvement Coach Professional Development Program

Information Call

February 14, 2018

These presenters have nothing to disclose

Karen Baldoza
Tricia Bolender
Sue Butts-Dion
Mark Bradshaw
Agenda

• Welcome and introductions
• Program overview and framework
• Program design and expectations
• Q&A
• Logistics and closing
WebEx quick reference

- Please use chat to “All Participants” for questions
- For technology issues only, please chat to “Host”
- WebEx Technical Support: 866-569-3239
- Dial-in Info: Communicate, Join Teleconference (in menu)
When chatting…

Please send your message to

_all participants_
Please mute your line

- Please keep your line on mute when you are speaking to minimize background noise
- You can mute or unmute using *6 on your phone
Please type your **name** and the **organization** you represent in the chat box!

Example: Doug Jones, Midwest Health System

What questions do you have about the program?
Karen Baldoza, MSW, Executive Director, Institute for Healthcare Improvement (IHI), is co-lead of IHI’s Improvement Science and Methods Portfolio and teaches in IHI's programs aimed at building individual and organizational capability for improvement. As a trained Improvement Advisor (IA) and Lean Facilitator, she also leads and coaches staff in improvement within IHI, and serves as an IA in IHI’s results-oriented initiatives such as The John A. Hartford Foundation-funded Creating Age-Friendly Health Systems. Previously, Ms. Baldoza was the Continuum of Care Portfolio Operations Director, overseeing IHI’s work in addressing the patient journey in health and chronic disease care outside of acute care settings. She also managed relationships with strategic partners and several large strategic initiatives, such as The Robert Wood Johnson Foundation-funded Pursuing Perfection initiative. Prior to joining IHI in 2000, Ms. Baldoza worked for the Commonwealth of Massachusetts as an assistant director in the Executive Office of Elder Affairs, and in public health prevention and policy efforts.
Tricia Bolender, MBA, Improvement Advisor
As an improvement specialist and consultant focusing on social impact, Tricia Bolender advises governments, nonprofits, foundations, and Fortune 500 companies and senior leaders on strategy, innovation, and sustainability. She serves as Faculty at the Institute for Healthcare Improvement, where she partners with governments in low- and middle-income countries to accelerate affordable access to high quality health care through systems change and improvement.

She received her BA from Harvard University, MBA from Columbia Business School and MA in International Affairs from Columbia University. She serves on the Board of Directors and sits on the Advisory Boards of several non-profits in the health and education fields, including Minds Matter, Kangu, and Unite for Sight. Her current focus is on authentic leadership, behavior change, and organizational effectiveness.
Sue Butts-Dion has more than 25 years of experience as an Improvement Advisor, working for the Institute for Healthcare Improvement, the National Institute for Children's Health Quality (NICHQ), Maine Quality Counts, North Carolina's Population Health Improvement Partners, New Hampshire’s Pediatric Improvement Partnership, Quorum Health Resources, and many other organizations. As President of Butts-Dion Consulting, Ms. Butts-Dion's work includes providing quality improvement support and coaching to many maternal and child health projects and advising the Centers for Medicare and Medicaid Services’ Strong Start Initiative for the IHI, NICHQ’s Texas Breast Feeding Learning Collaborative, and the Centers for Disease Control and Prevention’s EMPower Breastfeeding Collaborative. Sue currently leads the Improvement Advisor track for the IHI’s Breakthrough Series College. Among other publications, she co-authored *A Resource Guide for Chapters*, developed for the American Academy of Pediatrics and published in 2006, and "Partnerships for Quality Project: Closing the Gap in Care of Children with ADHD," published in 2007 in *The Joint Commission Journal on Quality and Patient Safety*. 
Mark Bradshaw, Event Coordinator at the Institute for Healthcare Improvement. Mark supports events and projects with the Improvement Capability team. Previous to IHI, Mark attended Suffolk University where he majored in both Political Science and Philosophy.
The aim of this program is to...

Further develop your improvement knowledge and skill so you can coach and facilitate improvement teams as well as support the implementation of improvement strategies throughout your organization.
This program is designed to help you…

• Understand the science of improvement and use the Model for Improvement as a roadmap for improvement projects

• Coach improvement teams on how to develop, test, and implement changes including identifying high-leverage change ideas and testing them using PDSA cycles

• Become skilled in how to use data for improvement and other key quality improvement tools

• Build skills in team facilitation, communication, decision making, and understanding team culture

• Apply just-in-time teaching of improvement skills to team members in order to advance the team’s work

• Leave with a specific plan for how you will continue coaching your team and prepare yourself to coach subsequent teams

• Learn concepts of implementation, sustainability, and scale-up
Curriculum framework: The CORE & ENGINE

**THE CORE**

- Solve a Problem
- Improve a Process
- Run Meetings & Manage Projects
- Use the Basic Tools
- Consider Advanced Tools

**THE ENGINE – MFI**

- What do you want to accomplish?
- How will you know change is an improvement?
- What changes will you make?
- How will you test ideas, sustain gains, spread success?
- How will you monitor progress?
Curriculum framework: The BUILDING BLOCKS

- QI Context and History
- Aim / Constancy of Purpose
- Systems / Process Thinking
- Theory of Knowledge
- Understanding Variation & Statistical Thinking
- PDSA Thinking
- Understanding People & Working with Teams
- Measurement for Improvement
- Customer Mindedness
- Change Ideas
- Project Leadership
Curriculum framework

<table>
<thead>
<tr>
<th>THE BUILDING BLOCKS</th>
<th>THE CORE</th>
<th>THE ENGINE – MFI</th>
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<tbody>
<tr>
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Building Competency as a Coach

The Learning Curve

Adapted from Bloom's Taxonomy of Educational Objectives, 1956
Building Competency the Real Story

Source: John S. Dowd, Courses in Continual Improvement. Adapted from Bloom's Taxonomy of Educational Objectives, 1956
Program design and key dates

Getting Started Webinar: March 21, 12-1:30 PM ET

Workshop 1: April 9-11, 12-3 PM ET, Boston, MA

Virtual Workshop 1: May 2, 12-3 PM ET

Virtual Workshop 2: May 9, 12-3 PM ET

Virtual Workshop 3: May 16, 12-3 PM ET

Workshop 2: June 4-6, 12-3 PM ET, Boston, MA

Final Webinar: June 20, 12-1:30 PM ET

Support:
- IHI.org
- Email distribution list
- Faculty consults
- Coaching feedback from fellow coaches and faculty
Expectations

• A team with an improvement project to coach – essential for successful learning!

• Knowledge of and previous experience applying quality improvement concepts, methods, and tools

• Ready to take the next step and coach improvement teams

• Conduct preparatory exercise and bring results to first workshop

• Attend both three-day, in-person workshops

• Participate in five virtual workshops/webinars

• Commit to working on your project immediately following the sessions – we learn by doing

• Willingness to share your work and coaching with the rest of the participants – all teach, all learn
# Workshop 1 Overview

<table>
<thead>
<tr>
<th>Day 1</th>
<th>Day 2</th>
<th>Day 3</th>
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<tbody>
<tr>
<td>• Let’s get started!</td>
<td>• How will we know that a change is an improvement?</td>
<td>• How will we test our change ideas?</td>
</tr>
<tr>
<td>• What is quality improvement?</td>
<td>• Understanding variation</td>
<td>• Running real PDSA cycles</td>
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<tr>
<td>• What are we trying to accomplish? Establishing aim statements</td>
<td>• Creating and using run charts</td>
<td>• PDSA exercise</td>
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<tr>
<td></td>
<td>• Running effective meetings and making team decisions (Part 1)</td>
<td>• Planning and coaching PDSA cycles</td>
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<tr>
<td>• Building your team: First things</td>
<td>• Running effective meetings and making team decisions (Part 2)</td>
<td>• Facilitation (Part 1)</td>
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<tr>
<td>• What do we want to accomplish? A deeper dive</td>
<td>• What changes can we make that will result in improvement?</td>
<td>• Teamwork and communication: Understanding working styles</td>
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<tr>
<td>• How will we know that a change is an improvement? The why, how,</td>
<td>• Developing change ideas</td>
<td>• Closing</td>
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<td>and what of “data for improvement”</td>
<td>• Selecting change ideas</td>
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<td>Lunch</td>
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<td>• Adjourn</td>
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Support
IHI.org
Email distribution list
Faculty consults
Coaching feedback from fellow coaches and faculty
## Workshop 2 overview

<table>
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<tr>
<th>Day 1</th>
<th>Day 2</th>
<th>Day 3</th>
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</thead>
<tbody>
<tr>
<td>• Using and coaching on run charts: Your turn</td>
<td>• One-on-one leadership coaching</td>
<td>• The long-term impact of improvement: Implementation, sustainability, and scale-up</td>
</tr>
<tr>
<td>• Developing change ideas: Creativity</td>
<td>• Developing change ideas: Change packages</td>
<td>• Breakouts: WIP presentations round 2</td>
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<td>• Breakouts: Works in Progress (WIP) presentations round 1</td>
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<td>• Breakouts: WIP presentations round 2</td>
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<tr>
<td>Lunch</td>
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<tr>
<td>• Control charts: An overview</td>
<td>• The art of coaching: Coaching practice round 1 breakouts</td>
<td>• The art of coaching: Coaching practice round 2 breakouts</td>
</tr>
<tr>
<td>• Facilitation - Part 2</td>
<td>• Visual displays of data</td>
<td>• Graduation!</td>
</tr>
<tr>
<td>• Qualitative Data</td>
<td>• Open space</td>
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<tr>
<td>Adjourn</td>
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  - Boston, MA

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  - 12-1:30 PM ET
  - Final Webinar

**Support**
- IHI.org
- Email distribution list
- Faculty consults
- Coaching feedback from fellow coaches and faculty
Questions?
Program logistics

• Workshops 1 and 2 will take place at the Institute for Healthcare Improvement (Boston, MA)

• Room block available at local hotel for both workshops

• Continuing education credits available for nurses, pharmacists, and physicians

• Enrollment fees:
  – Regular rate: $5,995 per person
  – Group rate: $5,096 per person (3 or more people)
  – Discounts and scholarships available
Program logistics

• For more information, go to:
  http://www.ihi.org/education/InPersonTraining/ImprovementCoach/Improvement-Coach/Pages/default.aspx

• Click here to enroll:
  http://app.ihi.org/events/SelectAttendee.aspx?New=1&EventId=3089
Improvement Coach

Begins March 21

Contact Caitlin!

Contact IHI team member Caitlin Littlefield (left) at 617-301-4800 or clittlefield@ihi.org to learn more and enroll for the Improvement Coach Professional Development Program.

ihi.org/ImprovementCoach
We hope you will join us!
Appendix

• More on Projects
• IHI’s Improvement Coach and Improvement Advisor Professional Development Programs Side-by-Side
Project selection

- The team’s project and its results should be important for your organization (unit/department for this smaller scope) and have a good chance of success
- The project is clearly a:
  - Process (where you can identify the boundaries) and it’s not currently undergoing changes already
  - Problem that is linked to a process
- Smaller scope – can test and see results during the program
- Potential measures have been identified, and data can be collected daily (weekly, if necessary)
- The project has a sponsor who can help guide and monitor the project and remove barriers to improvement
- The team or team’s sponsor has control over the systems, processes, products, or organizations where the anticipated changes must be made
- Improvement team members are available and eager to learn
- The process owner is able and willing to be the team leader and work with you in and between team meetings
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Additional Details</th>
<th>Your Score (1 – 5)</th>
</tr>
</thead>
</table>
| Availability of team      | • Project team includes 3 to 5 people  
• Team able to meet frequently enough to apply learning  
• Leaders willing to give Improvement Coach dedicated time to work on project                                                  | Note: A score of 5 indicates strong agreement with this criteria while a score of 1 indicates little to no agreement with this criteria. |
| Authority of team         | • Team able to make changes without permission  
• Process owner able and willing to lead team                                                                                                            |                                                                                  |
| Willingness of team       | • Team eager to learn and willing to participate  
• Process owner willing to work with Improvement Coach                                                                                                 |                                                                                  |
| Type of project           | • Project is improvement of a process  
• Process is not already undergoing major change  
• Project is in its infancy or has not started yet  
• Data for process already exists                                                                                                                     |                                                                                  |
| Scope of project          | • Project could be completed over the course of 3 to 6 months  
• Project has a high likelihood of success  
• Key measures of success have already been defined                                                                                                 |                                                                                  |
| Energy and interest       | • Improvement Coach finds project interesting and engaging  
• Organization finds project of benefit to overall strategy                                                                                           |                                                                                  |
Examples of appropriate projects

• Improve a process that produces good results most of the time but occasionally results in errors or problems
• Identify a process that better matches and meets a patient or family need, even if patients or families have not expressly asked for it
• Identify and improve processes, products, and services by making fundamental changes even though the output is currently not considered a problem, in order to deliver even better outcomes in the future
• Improve a product, process, or service today, which will put us in a better competitive position
• Fix a recent or recurring problem that all agree needs to be fixed to put a process back (restore) to the level it was designed to perform or to exceed expected performance
Not good candidates for a project

- Developing a measurement system
- Fixing a transient problem or emergency
- Implementing inspections/reviews to prevent errors from reaching the patient/customer
- Improving employee compensation
- Implementing a one-time or infrequent training or educational workshops
- Area of focus currently undergoing major changes already
- Any project where you expect an IT or training solution
- Any project where you cannot answer the question “How will I know a change is an improvement?”
- No leadership support or outside the sponsor’s control or influence
- Huge (“solving world hunger”) projects with short timeframes
- Politically charged issues
Examples of past participants’ teams’ improvement projects

- Reducing pressure ulcers; Visual cues for bedside staff in pediatric pressure ulcer prevention
- Reducing resident falls at Hospital A
- Emergency department utilization at Medical Center B with patients
- Improving emergency department care of patient’s with DVT/PE
- Improving follow-up post hospital stay
- Improving diabetes outcomes
- Increasing access to behavioral health
- Reducing the number of days to schedule an appointment for surgery
- Decreasing wait time for cancer patients seeking overnight lodging
- Patient-centered design: Reducing paperwork for patients (and increasing patient and provider work flow and satisfaction)
- Improving adherence to new guidelines
- Reducing appointment “no-shows”
- Improving medical screening process; Increasing screening rate for social needs in an ambulatory clinic
- Improving hydration on an elderly ward
- Increasing community resident attendance in fitness programs
- Increasing student asthma medications in school nurse’s office
- Reducing parental complaints regarding homework
- Improving housing placements; Improving rapid re-housing
## IHI’s Improvement Coach and Improvement Advisor Programs

<table>
<thead>
<tr>
<th>Audience</th>
<th>Improvement Coach</th>
<th>Improvement Advisor</th>
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</thead>
<tbody>
<tr>
<td>Those seeking to incorporate improvement into daily work area/responsibilities and coach improvement teams</td>
<td></td>
<td>Those who are or are becoming improvement professionals</td>
</tr>
<tr>
<td>Scope</td>
<td>Unit/department level</td>
<td>Organization-wide</td>
</tr>
<tr>
<td>Time spent in improvement role and responsibility</td>
<td>25-50% to support and facilitate organizational improvement strategies</td>
<td>Nearly 100% to accomplish organizational improvement strategies</td>
</tr>
<tr>
<td>Program application</td>
<td>Coach a team running an improvement project (small-medium scope)</td>
<td>Lead a strategic improvement project</td>
</tr>
<tr>
<td>Program length</td>
<td>3-4 months</td>
<td>11-12 months</td>
</tr>
<tr>
<td>Program workshops</td>
<td>2 (3 days each)</td>
<td>3 (4 days each)</td>
</tr>
<tr>
<td>Program webinars</td>
<td>5</td>
<td>13</td>
</tr>
<tr>
<td>Audience experience level</td>
<td>Competent-Proficient</td>
<td>Proficient-Expert</td>
</tr>
<tr>
<td>Price</td>
<td>$5,995/person (regular rate)</td>
<td>$16,200/person (regular rate)</td>
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