April 2023

Improvement Coaching Workshop

Day 2

California Quality Collaborative

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Event Feedback

Achievement Based Objectives

- **Defined** attributes of an improvement coach for an improvement team and identify how teams can grow coaching skills

- **Examined** ways to prepare an organization and clinic/practice for change

- **Designed** and facilitated a kick-off meeting that promotes buy-in and builds will

- **Exchanged** ideas, best practices, and feedback with peers through facilitated discussion and informal connections

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Improvement Coaching & Improvement Teams Overview

- What is Improvement Coaching and who is the improvement coach?

- Why should we build improvement coaching skills within our organizations?

- How can we build capability/capacity for improvement coaching?

What behaviors, attributes, competencies, and/or activities made that supporter valuable?

- Use sticky notes to record your response
  - 1 value per sticky note
- Discuss your answers with a neighbor
- Save your responses for a later activity

Remember: The goal of brainstorming is VOLUME!

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What is Improvement Coaching?
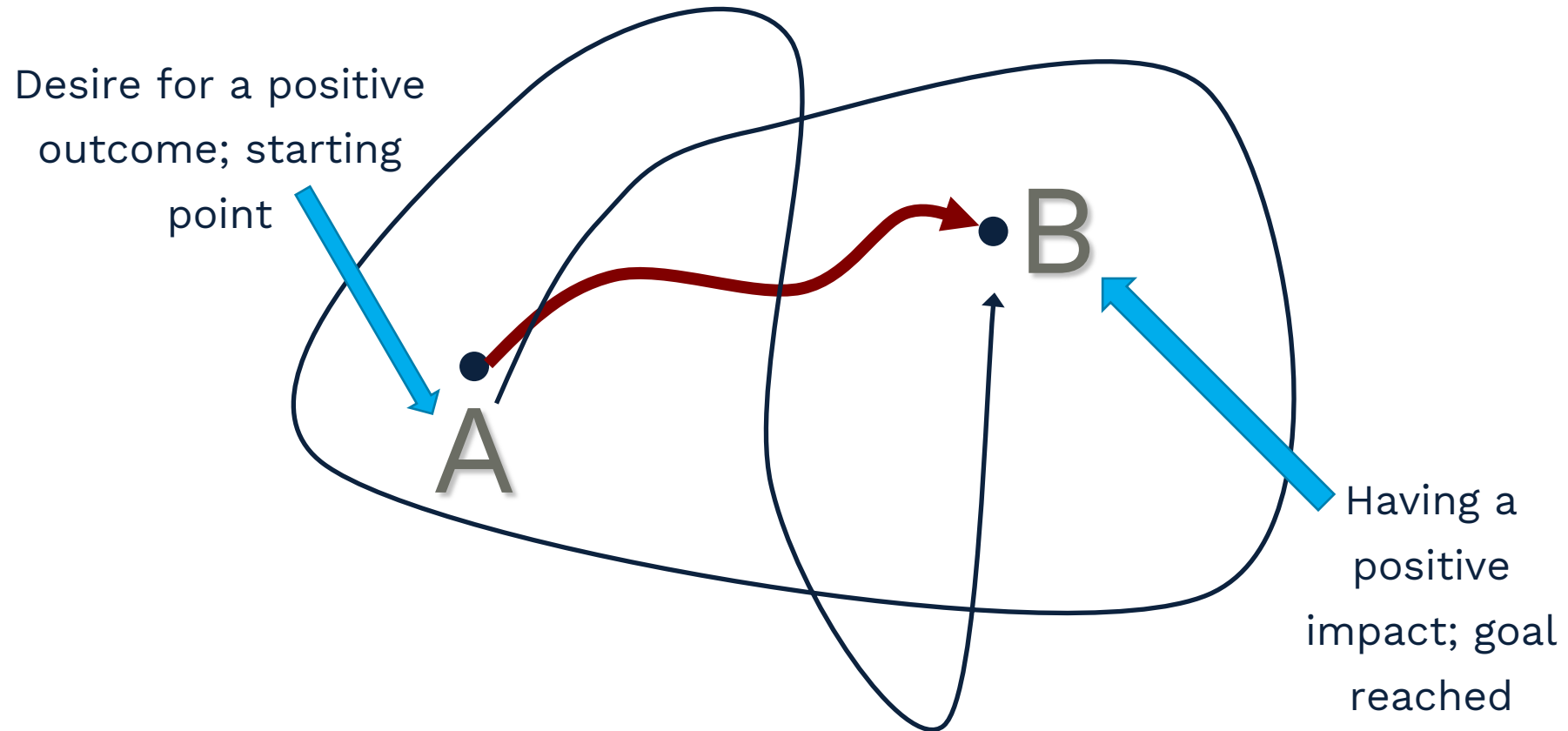
Organizational Development

Quality Improvement

Project Management

Practice Engagement

Improvement coaching is a supportive service offered by a trained individual that uses a range of "approaches and methods to build the internal capacity of a practice to help it engage in improvement activities over time."
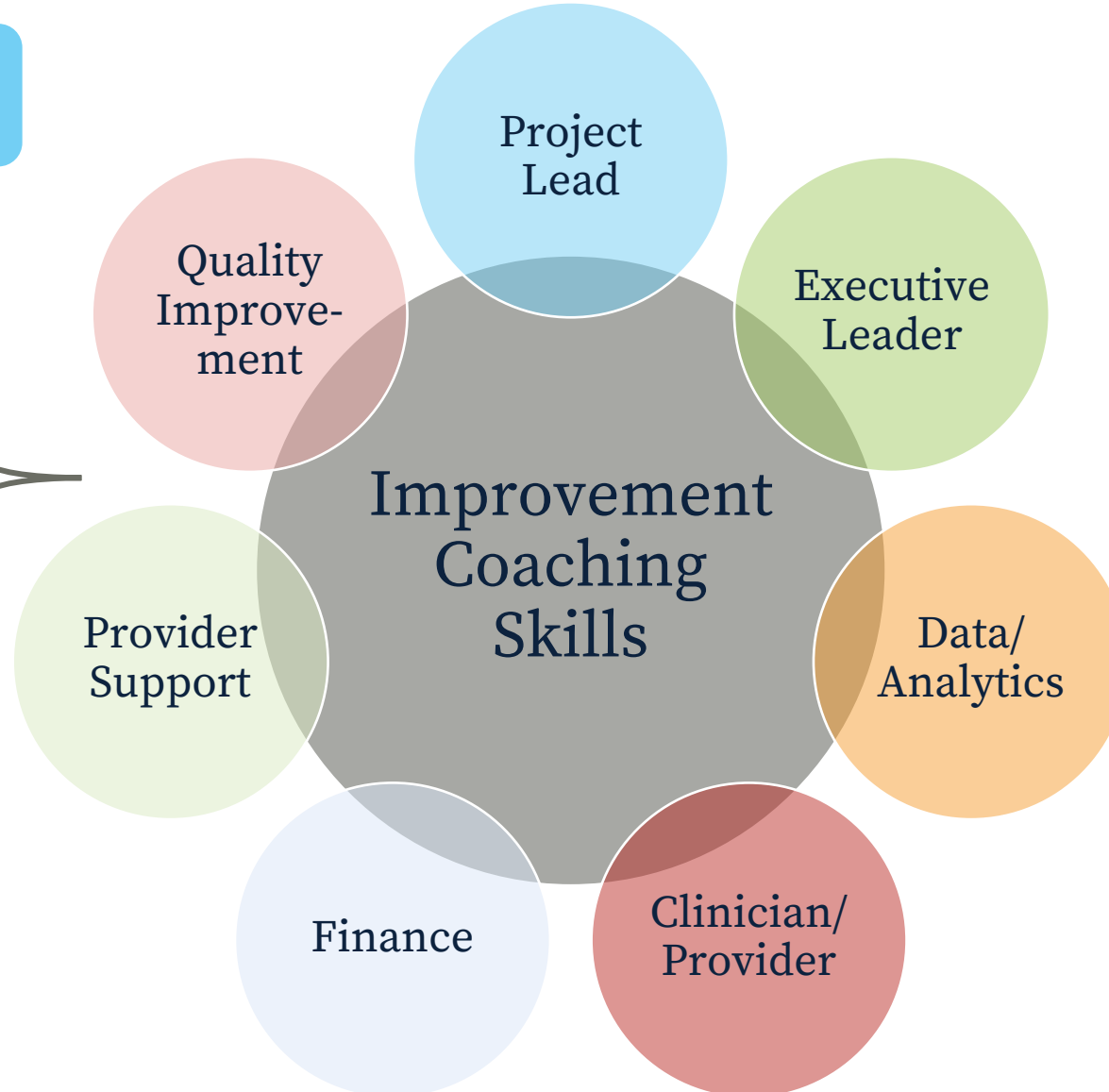
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Why Invest in Improvement Coaching Development?

Desire for a positive outcome; starting point

A

B

Having a positive impact; goal reached

7

Who is the Improvement Coach?

ALSO KNOWN AS:
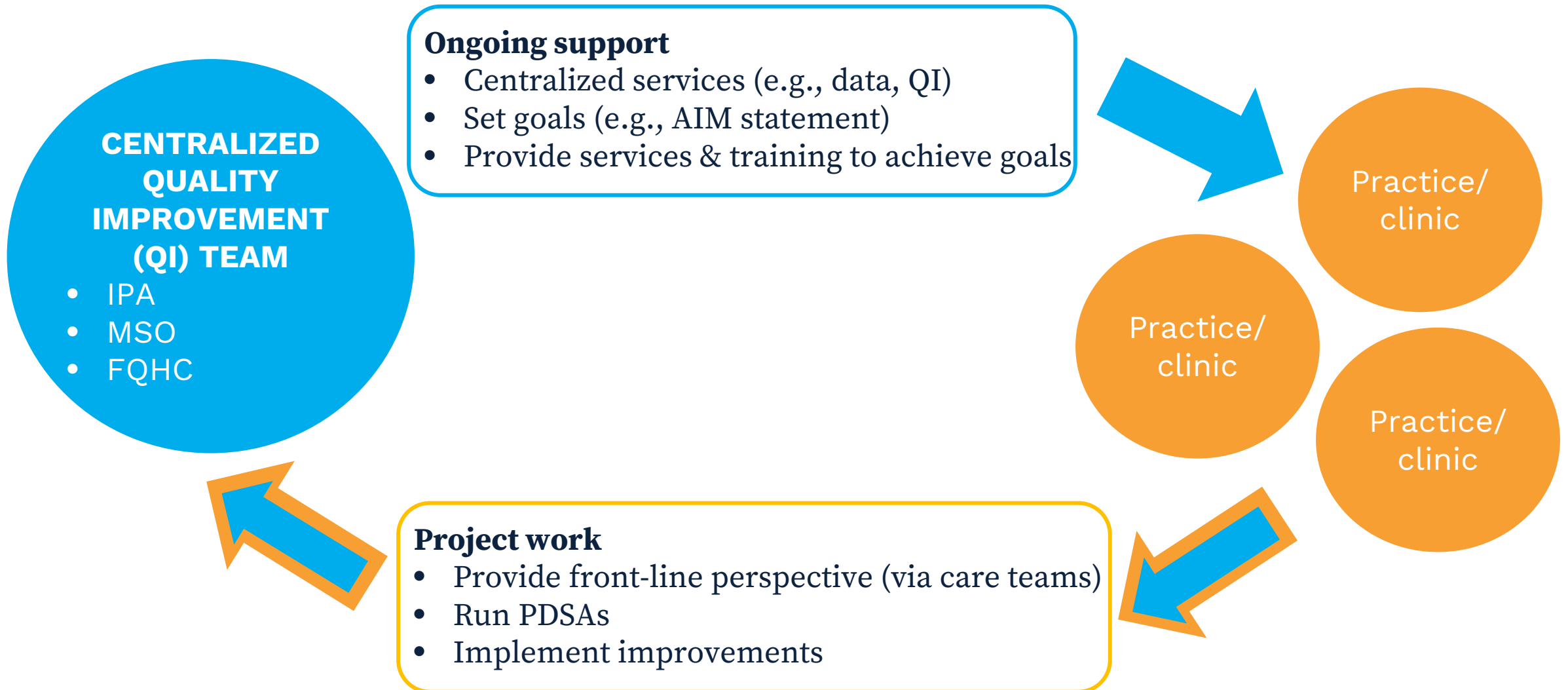
- **PRACTICE FACILITATOR**
- **PRACTICE COACH**
- **QUALITY IMPROVEMENT SPECIALIST**
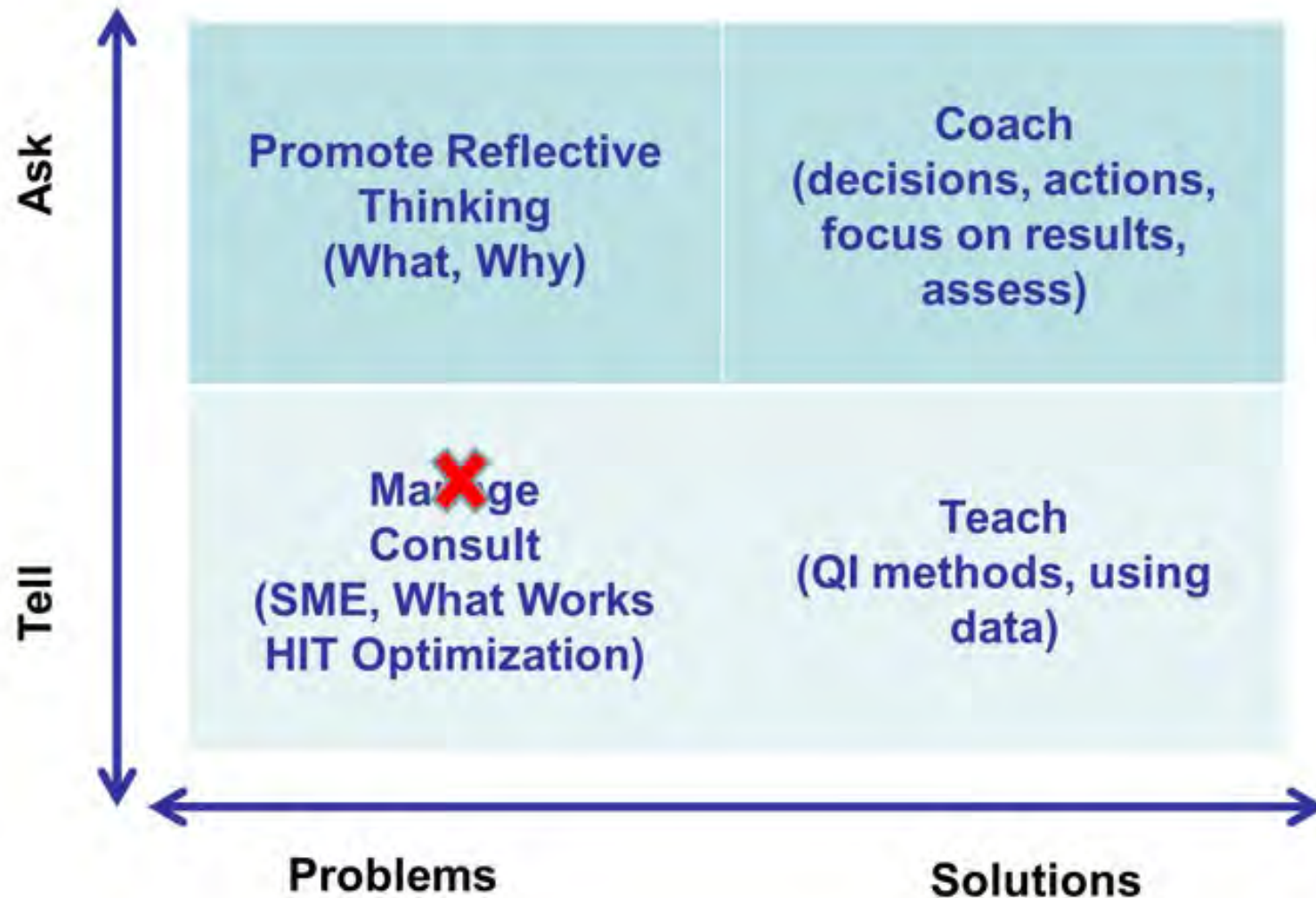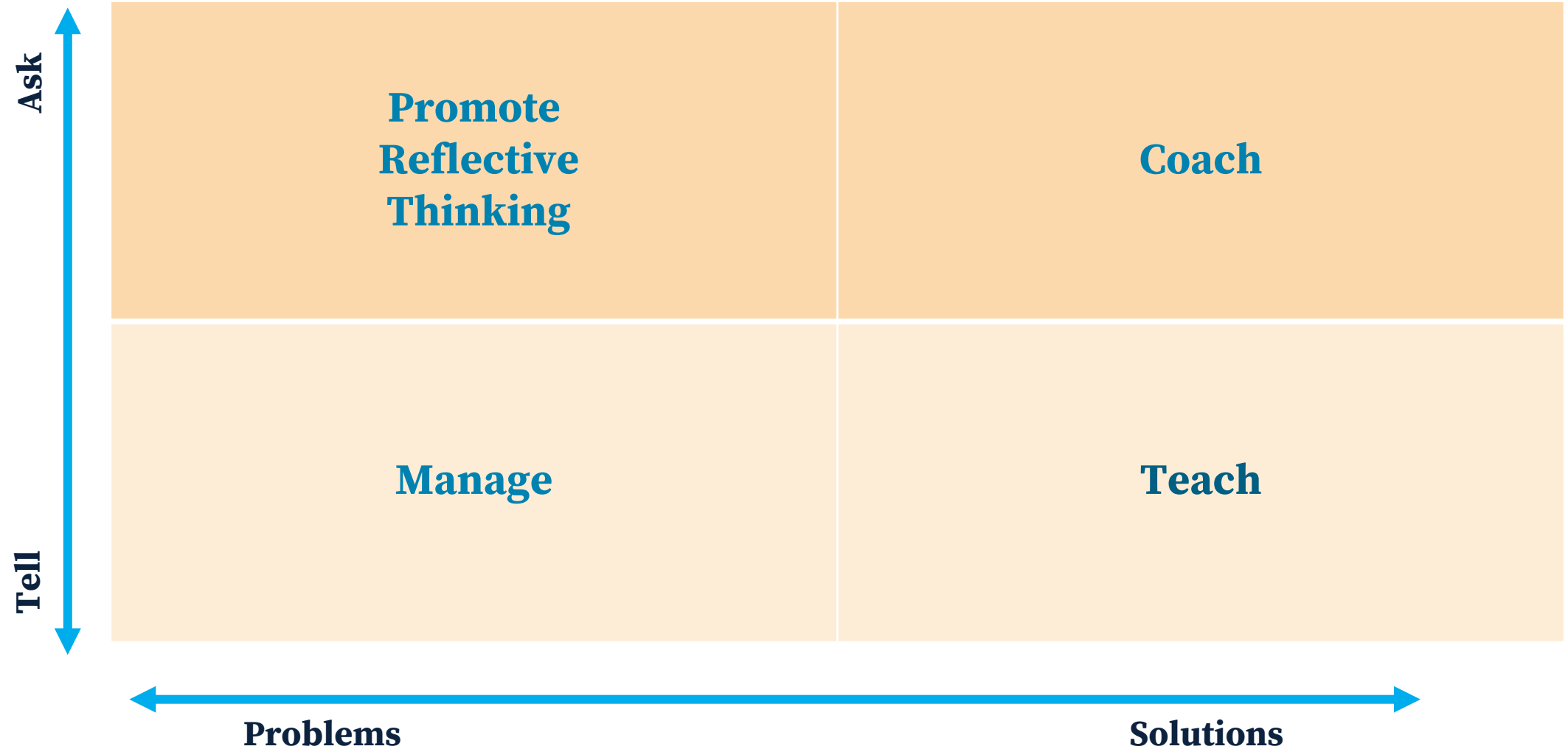- **IMPROVEMENT CONSULTANT/ ADVISOR**

Improvement Coaching Skills

- Project Lead
- Executive Leader
- Data/ Analytics
- Clinician/ Provider
- Finance
- Provider Support
- Quality Improvement

CENTRALIZED QUALITY IMPROVEMENT (QI) TEAM

Ongoing Support & Future Projects

Ongoing support
- Centralized services (e.g., data, QI)
- Set goals (e.g., AIM statement)
- Provide services & training to achieve goals

CENTRALIZED QUALITY IMPROVEMENT (QI) TEAM
- IPA
- MSO
- FQHC

Practice/ clinic

Practice/ clinic

Practice/ clinic

Project work
- Provide front-line perspective (via care teams)
- Run PDSAs
- Implement improvements

What Skills Does a Coach Need?

Promote Reflective Thinking (What, Why)

Coach (decisions, actions, focus on results, assess)

Manage ✗ Consult (SME, What Works HIT Optimization)

Teach (QI methods, using data)

Ask / Tell (vertical axis)

Problems / Solutions (horizontal axis)

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Improvement Coaching Attributes

Activity: Improvement Coach Attributes

- Gather the stickies you created during the opening exercise

- Join your group

- Share your "stickies" with the group

- Gain consensus about which quadrant label "best" fits the characteristic/behavior/activity

- Place appropriately on the chart pad

- Identify/discuss trends and add any new characteristics/activities/behaviors that have surfaced during your discussion

- Identify a spokesperson to share your learnings

15 MINUTES

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What did you notice about the attributes of an improvement coach?

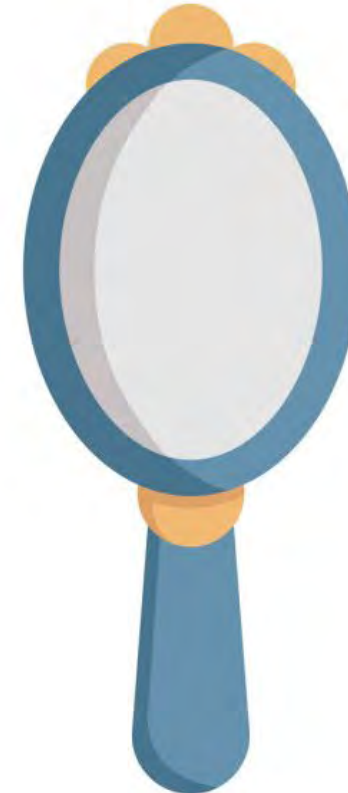# Summary: Improvement Coaching Attributes

Core Competencies

Improvement Methodology

Change Management Principles

Project Management

Use of Data for Improvement

Meeting Facilitation; Active Listening

Communication Techniques

Acting on Feedback

Application of Spread/ Sustainability

Positive Attributes

Adaptability

Interpersonal Communication Skills

Creative Thinking

Decision Making

Positivity

Flexibility

Empathy

Critical Thinking

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Think About Your Role and Area of Expertise

- Project Lead
- Executive Leader
- Quality Improvement
- Improvement Coaching Skills
- Data/Analytics
- Provider Support
- Finance
- Clinician/Provider

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Activity: Building Improvement Coaching Capacity/Capability

- Discuss and record at least two ACTIONs you can do to build improvement coaching capacity and capability:
  - For your organization?
  - For your team?
  - For others you might engage in the work of improving?

- Identify one person to share with the group
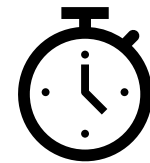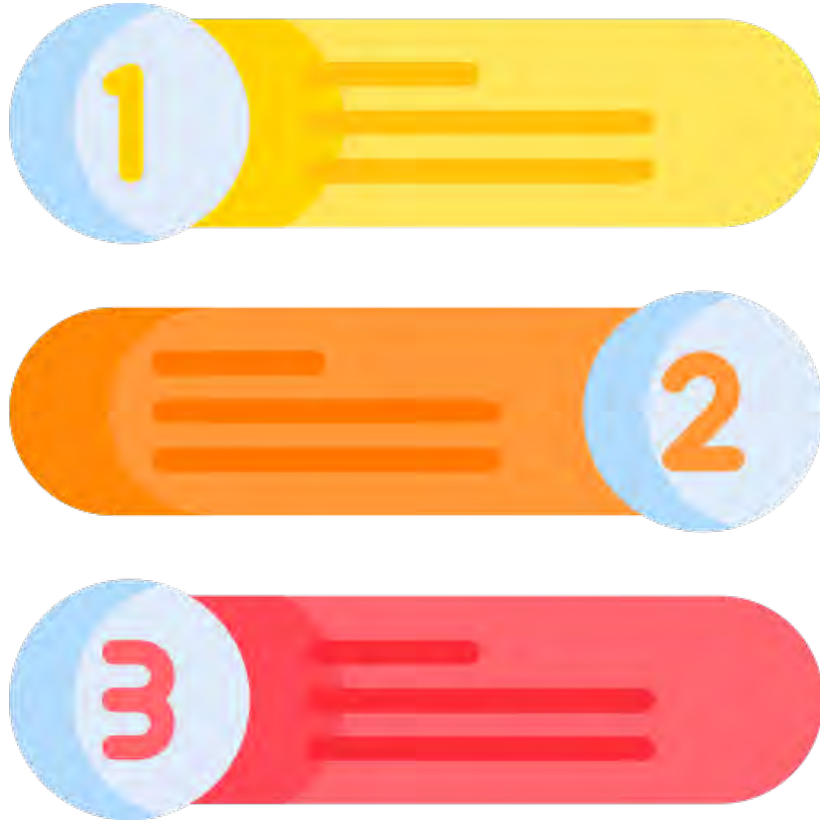
10 MINUTES

What Questions Do You Have?

Change Management

- How do you use a change management framework to prepare an organization/practice for change?
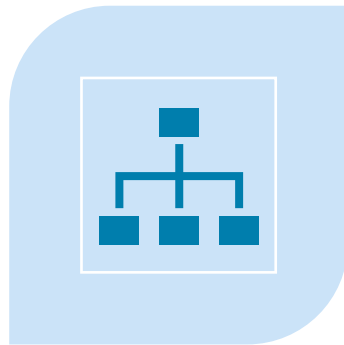
Thinking About Readiness to Change

Consider a change that you have recently made:

- What steps did you take to make the change?

- Share with your neighbor

Achieving Transformational Change
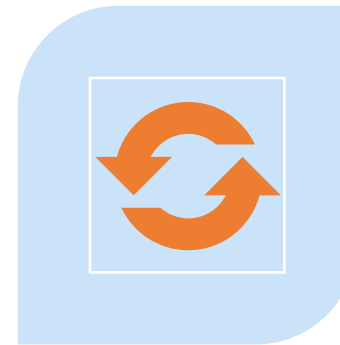
Incremental Transformational Change

Guided by a Shared Vision

BROADSCALE TRANSFORMATION

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Change Readiness: A Two-Part Equation

Organization Readiness + Clinic/Practice Readiness = Change Readiness

Organizations and Practices are People

Ready
- Know what is expected

Willing
- Have a desire for the new process

Able
- Equipped with tools and skills

Prepare for Change

Implementing and sustaining for change

8. Make it stick

7. Build on the change

Engaging & enabling the organization

6. Create quick wins

5. Empower action

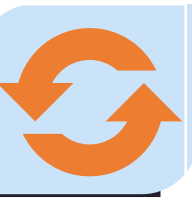**4. Communicate the vision**

3. Create a vision for change

Creating the climate for change

2. Form a powerful coalition

1. Create urgency

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Activity: Preparing for Change

Creating the Climate for Change		
Step	**Org.**	**Practice**
1. Create urgency		
2. Form a coalition		
3. Create a vision		

Or

Engaging & Enabling		
Step	**Org.**	**Practice**
4. Communicate vision		
5. Empower action		
6. Create quick wins		

Scenario: Your organization is planning a program to support practices through a virtual patient education class.

The assignment: 🕐 **15 MINUTES**

- Break up into groups of 5-6
- Gather at one of the chart pads on the wall, which will display one of the above charts
- For each step listed, identify "what" the organization AND the practice might focus on and/or do in order to be ready for change

Share, Compare, Consolidate

- Bring your chart pad and meet up with other group

- Share and compare the ways you identified for the organization and practice to become change ready for each step

- Collaborate to agree on a combined list of the **two** most essential actions per step/category.
  - Are there any similarities in "how" the organization/practice accomplishes the listed step?

- Identify a spokesperson to share with the group
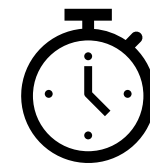
10 MINUTES

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Prepare for Change

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Other Considerations for Preparing Organizations for Change
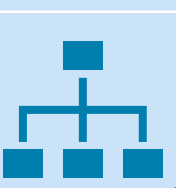
- Alignment with business strategies and objectives
- Demonstrated leadership endorsement and engagement
- Planned/targeted communication strategies
- Access to accurate data and analysis of same
- Identified goals and measurable improvement/ROI/value
- Impactful improvement coaching that builds capability/capacity

What Questions Do You Have?

Preparing to Engage the Practice

- How can we learn and understand more about the practice we are engaging?

- How do our learnings about the practice inform our ability to build will?

Engaging Individuals and Teams in a Practice Setting

- Think about a time when you needed to engage individuals and/or a team within a practice to accomplish something

- What happened?
  - How did the individuals you were attempting to engage respond?
  - Why do you think they responded that way?

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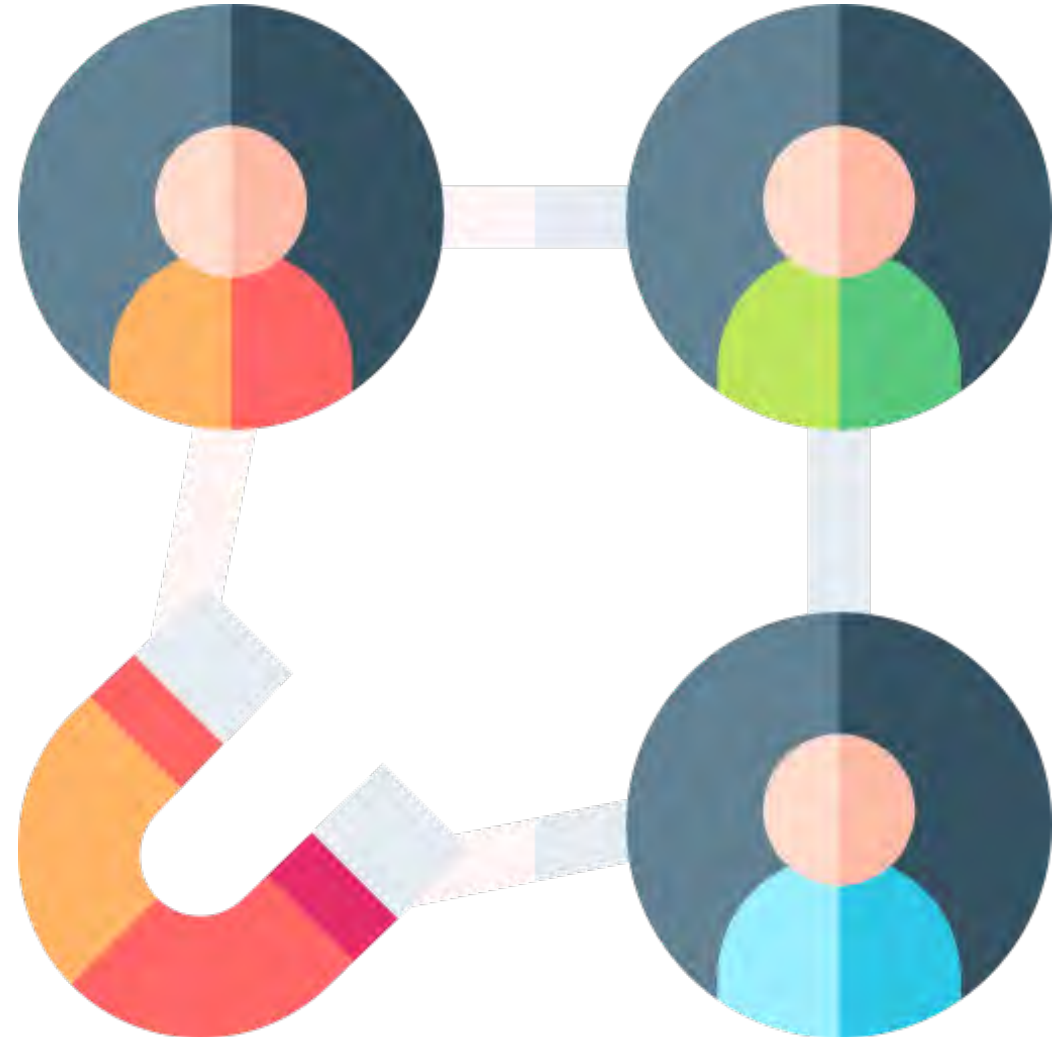
Marketing Rule #1: Get to know your customer!

Do Your Homework:
Learn About and Understand the Practice

Capacity

- **Definition**: willingness to take on change
- Practice Readiness Checklist

Clinical Performance

- **Definition**: processes and outcomes of patient care
- Internally tracked
- Externally reported scorecards

Capability

- **Definition**: skills, knowledge, resources, stability
- Assessment (e.g., internal; health plan)
  - Implementation Milestone Assessment Tool
  - Others (10 Building Blocks, PCMH)

Are You Willing to Change?

Balancing Willingness to Change [Capacity] with Stability [Capabilities]

Capacity

Organization's Capabilities

Capacity to change but poor capabilities

Capacity to change and high capabilities

No capacity to change and poor capabilities

Capacity to change but poor capabilities

Adapted from: https://www.ahrq.gov/sites/default/files/wysiwyg/ncepcr/tools/PCMH/qi-strategies-practices.pdf

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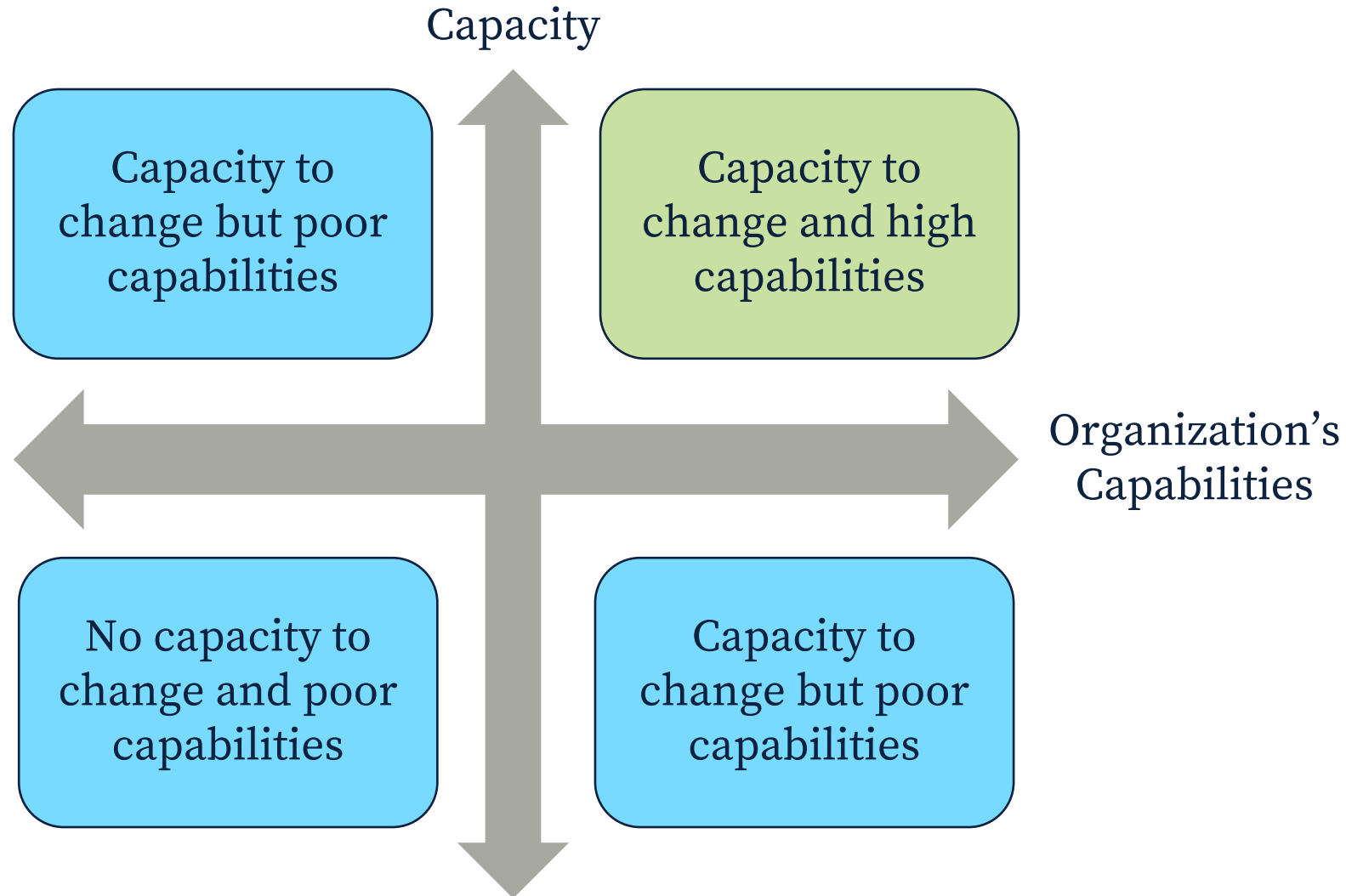
Capacity: Practice Readiness Checklist

Figure 12.2 Checklist for assessing practice readiness

___ Practice or organizational leadership is interested in specific or general improvement as evidenced by request for assistance or receptivity to receiving facilitation to support improvement.

___ Practice or organizational leadership is willing to participate in ongoing communication with the practice facilitator and participate on the quality improvement team.

___ Practice or organization is willing and able to identify an "improvement" champion who will be the practice facilitator's point person.

___ Leadership is willing to provide protected time for key staff to engage in improvement work.

___ Team members are willing to meet regularly as a quality improvement team, and members follow through with this plan.

___ Team members are willing to gather and report data on practice performance on key metrics.

___ Practice has sufficient organizational and financial stability to avoid becoming too distracted or overwhelmed by competing demands or financial concerns.

___ Practice is not engaged in other large-scale improvement projects and does not have other demanding competing priorities.

https://www.ahrq.gov/professionals/prevention-chronic care/improve/system/pfhandbook/mod12.html#fig12.2

Clinical Performance

Quality Data

- Internally tracked
- Externally reported scorecards
- Stratification; risk stratification

Tips
- Ensure collection is standardized across your clinic/practices
- Identify how to measure understanding/ use of data

Stratification vs. Risk Stratification

Stratification

- Sorts data, people and objects into distinct groups or layers

Risk Stratification

- Separating a patient population into high-risk and low-risk of having an outcome
- Coupled with interventions that target high risk patients
- Goal is typically to reduce cost and improve patient outcomes

Why Stratify Data?

- Identifies distinct groups within the data
  - Clinic sites
  - Provider
  - Teams
  - Health Equity
    - Patient demographics (e.g., age, Race, Ethnicity and/or Language)
    - Social Determinants of Health (e.g., access, quality, economic stability)

- Highlights health inequities and factors that drive them

Capability Assessment

Capability

- **Definition**: skills, knowledge, resources, stability
- Assessment (e.g., internal; health plan)
  - Implementation Milestone Assessment Tool
  - Others (10 Building Blocks, PCMH)

You Now Understand the Practice – What's Next?

Capacity
- **Definition**: willingness to take on change
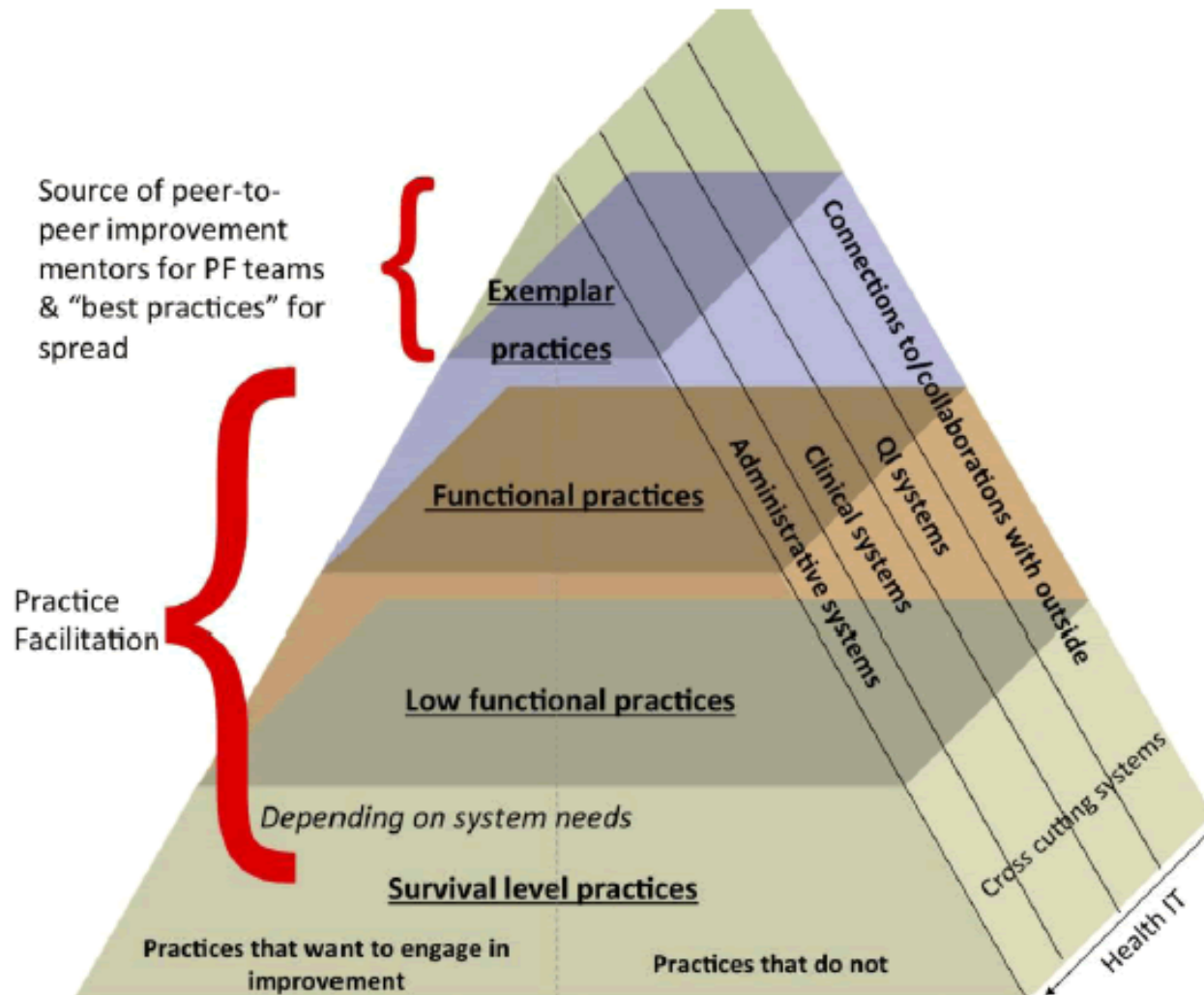- Practice Readiness Checklist

Clinical Performance
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  - Others (10 Building Blocks, PCMH)

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Right-Sizing Support

Source of peer-to-peer improvement mentors for PF teams & "best practices" for spread

Practice Facilitation

Exemplar practices

Functional practices

Low functional practices

Depending on system needs

Survival level practices

Practices that want to engage in improvement

Practices that do not

Connections to/collaborations with outside

QI systems
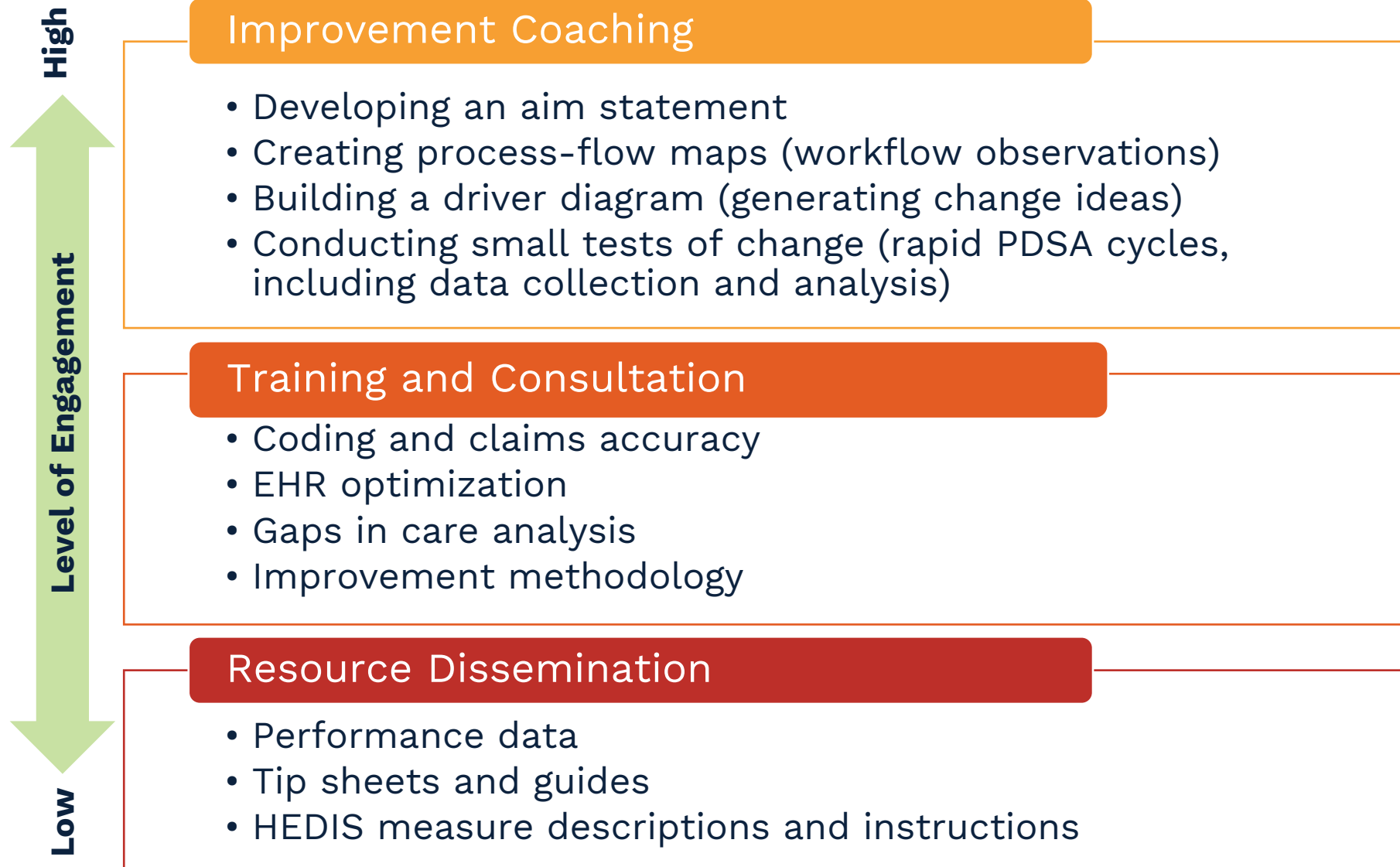
Clinical systems

Administrative systems

Cross cutting systems

Health IT

Consider

- How might you leverage exemplar practices to build will in other practices?

- How to ensure survival level practices aren't falling through cracks?

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Align Support with Capacity and Capability

Level of Engagement (High → Low)

Improvement Coaching

- Developing an aim statement
- Creating process-flow maps (workflow observations)
- Building a driver diagram (generating change ideas)
- Conducting small tests of change (rapid PDSA cycles, including data collection and analysis)

Training and Consultation

- Coding and claims accuracy
- EHR optimization
- Gaps in care analysis
- Improvement methodology

Resource Dissemination

- Performance data
- Tip sheets and guides
- HEDIS measure descriptions and instructions

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Activity: Practice Assessment Worksheet

- With your team, find the Practice Assessment Worksheet in your Workbook

- Complete for the practice/clinic for which you developed an Aim Statement

- If you don't have answers to questions, identify you plan for obtaining the information

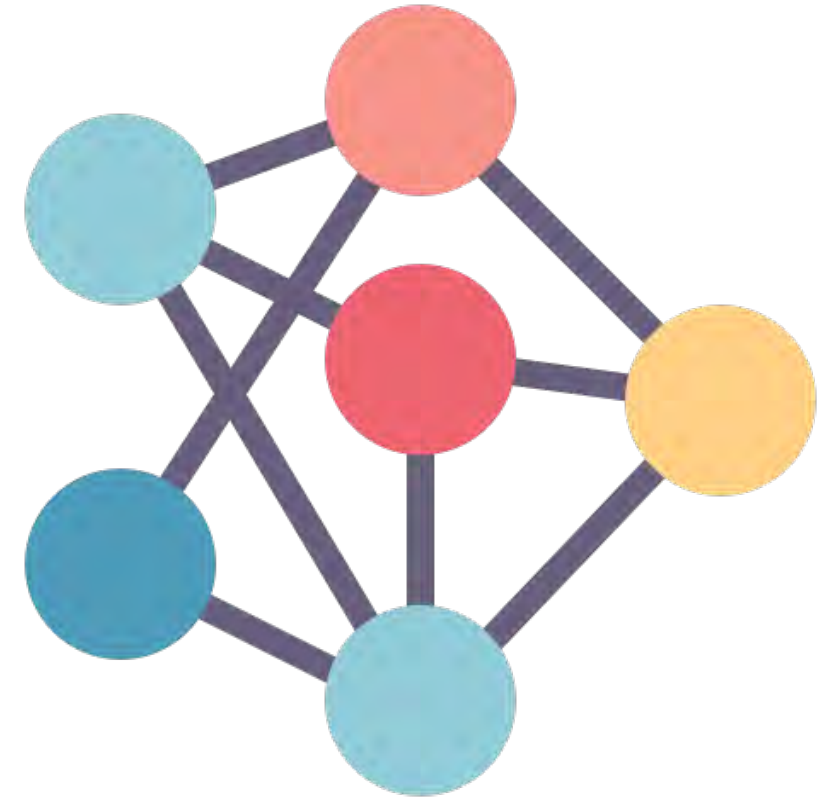**15 MINUTES**

Use Practice Learnings to Build Will

Your learnings can help you build a practice's desire and determination to improve by informing your:

- Introductory elevator speech

- Quality Improvement kick-off agenda and activities

- Shaping your communications

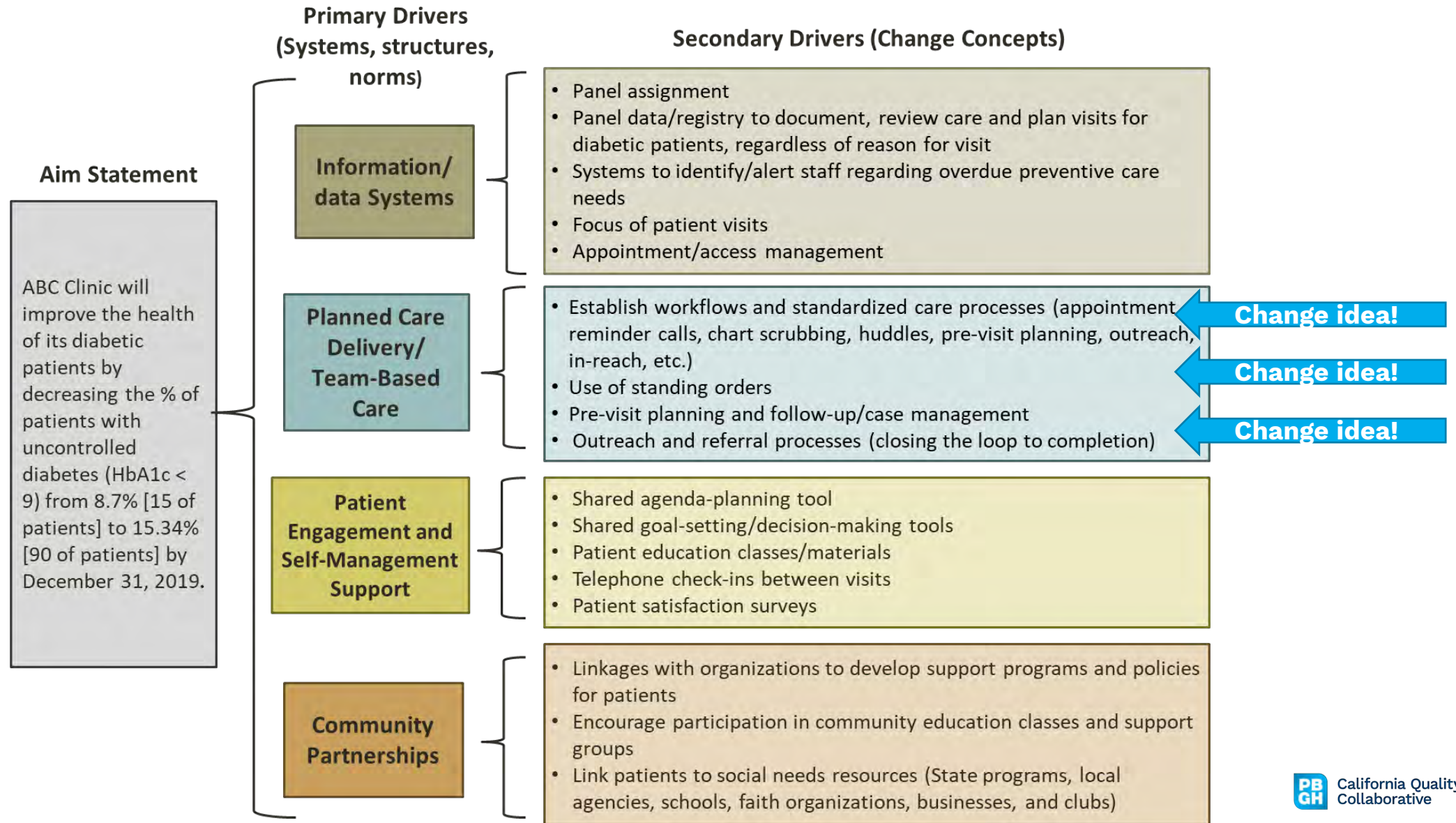- Identifying the primary areas of improvement focus

Use Learnings About Performance Data to Identify Focus Areas for Change

- Data analysis and practice assessment outcomes reveal potential reasons for current performance

- Data can:

  6. Create quick wins

  5. Empower action

  4. Communicate the vision

- Results can connect to the secondary drivers (change concepts) on the driver diagram

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Connect Results to Drivers

Primary Drivers (Systems, structures, norms)

Secondary Drivers (Change Concepts)

Aim Statement

ABC Clinic will improve the health of its diabetic patients by decreasing the % of patients with uncontrolled diabetes (HbA1c < 9) from 8.7% [15 of patients] to 15.34% [90 of patients] by December 31, 2019.

Information/ data Systems

- Panel assignment
- Panel data/registry to document, review care and plan visits for diabetic patients, regardless of reason for visit
- Systems to identify/alert staff regarding overdue preventive care needs
- Focus of patient visits
- Appointment/access management

Planned Care Delivery/ Team-Based Care

- Establish workflows and standardized care processes (appointment reminder calls, chart scrubbing, huddles, pre-visit planning, outreach, in-reach, etc.) — **Change idea!**
- Use of standing orders — **Change idea!**
- Pre-visit planning and follow-up/case management
- Outreach and referral processes (closing the loop to completion) — **Change idea!**

Patient Engagement and Self-Management Support

- Shared agenda-planning tool
- Shared goal-setting/decision-making tools
- Patient education classes/materials
- Telephone check-ins between visits
- Patient satisfaction surveys

Community Partnerships

- Linkages with organizations to develop support programs and policies for patients
- Encourage participation in community education classes and support groups
- Link patients to social needs resources (State programs, local agencies, schools, faith organizations, businesses, and clubs)

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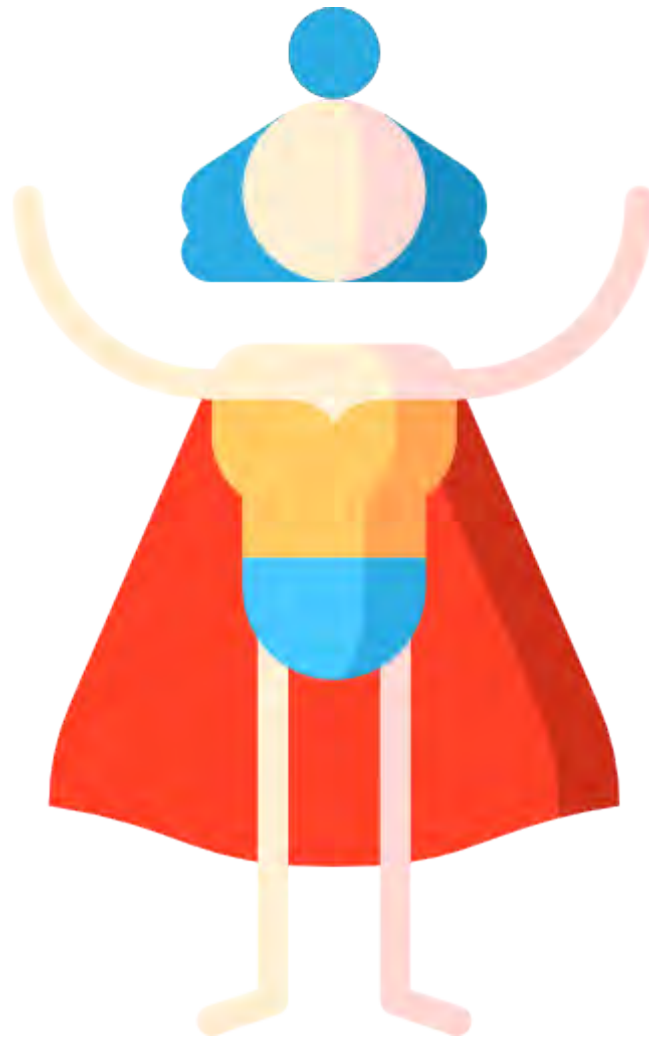**California Quality Collaborative**

Kicking Off a QI Project

- How do we get started with Quality Improvement in a clinic/practice?

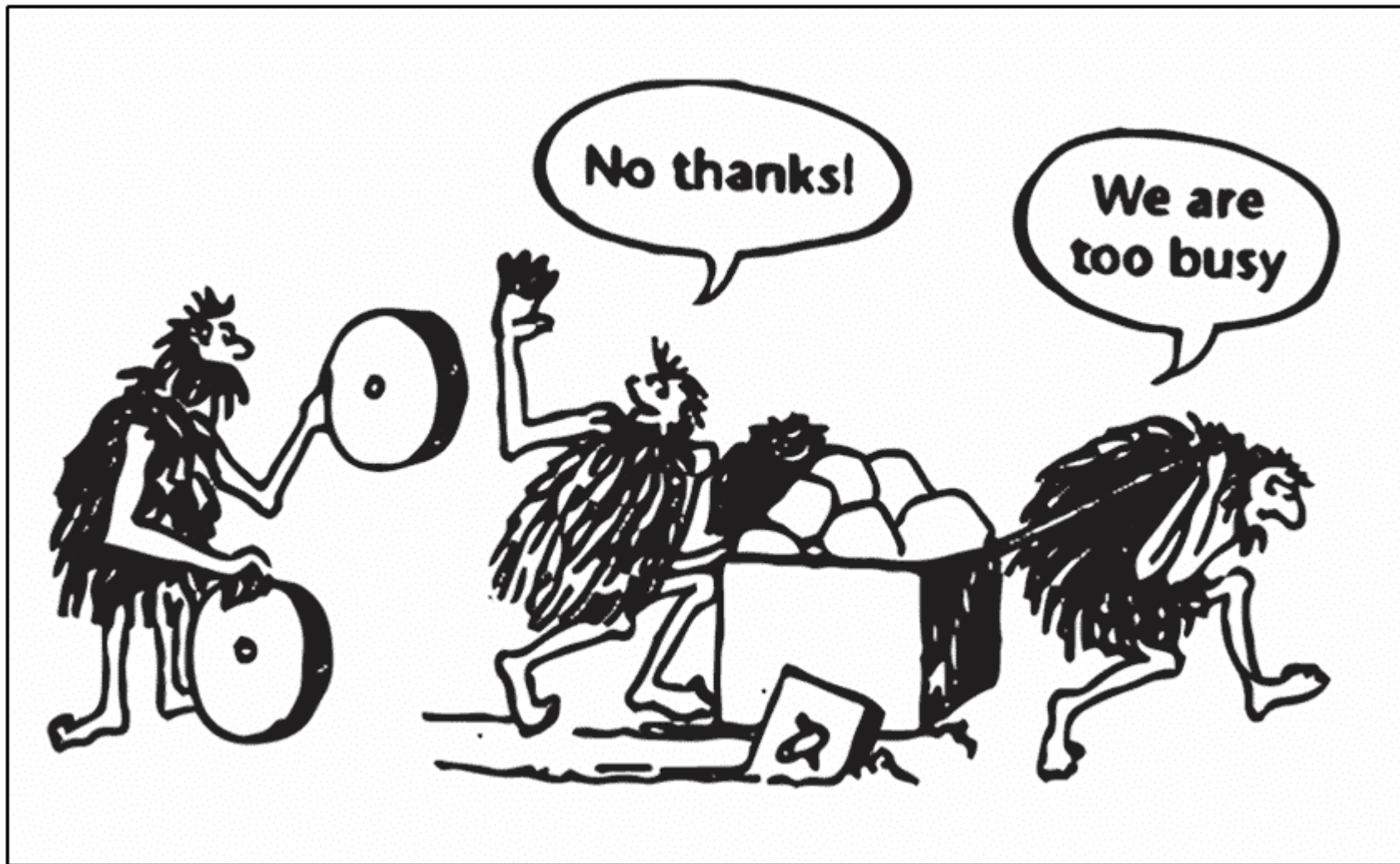- What approaches might we use to build will and engage the clinic/practice?

Are you prepared for this . . .

Or this . . .

We

Organization name

Will improve

High level broad focus area: health of our patients, operational efficiency, patient experience, etc.

By

Reducing/decreasing or raising/increasing project focus: diabetes management, breast cancer screening, etc.

For

Patient population

From   **to**

    Baseline   *Target goal*

By when

Target date – specific exact date

Prepare for Change

Implementing and sustaining for change

8. Make it stick

7. Build on the change

Engaging & enabling the organization

6. Create quick wins

5. Empower action

4. Communicate the vision

Will

Creating the climate for change

3. Create a vision for change

2. Form a powerful coalition

1. Create urgency

Building the Desire and Determination to Improve

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Implementing a QI Project with a Clinic/Practice

Introduce yourself and the team; share the details of your project design, goals, and benefits **(Elevator Pitch)**

Share expectations, participation requirements **(e.g., contracts, MOU)** and planned activities **(e.g., assessments/observations)**

Review performance data (run charts) to confirm area of focus for improvement work together

Gain commitment regarding participation and timeline **(e.g., Practice Commitment Checklist; MOU)**

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Introduce: Develop an Elevator Pitch

- A brief persuasive speech used to spark interest in your organization, project, idea, or product

Nine C's of an Effective Elevator Pitch

- Concise – few words as possible

- Clear – can be understood by anyone

- Compelling – solves the problem

- Credible – you are qualified to build the solution

- Conceptual – not too much unnecessary detail

- Concrete – specific and tangible

- Customized – addresses specific interests and concerns

- Consistent – conveys the same basic message

- Conversational – set the hook, start a conversation

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Share Expectations

- Program details, participation requirements, deliverables and planned activities
    - Discuss improvement science and how it will be applied
    - Share other planned activities that will inform improvement:
        - Assessments
        - Observations
        - Data collection

Review Performance Data

- Know the data inside/out before you go

- Use run charts to guide performance discussion
    - Guide discovery of successes and potential areas for improvement
        - "The data reveal your current process – the current way you do things, results in this performance. Therefore, to get a different result, we will need to change the current process."

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Gain Commitment

Generate accountability

Capture and document agreements for participation and timeline

Options include:

- Practice Commitment Checklist
- Memorandum of Understanding (MOU)

This is Your Opportunity to Strengthen a Relationship
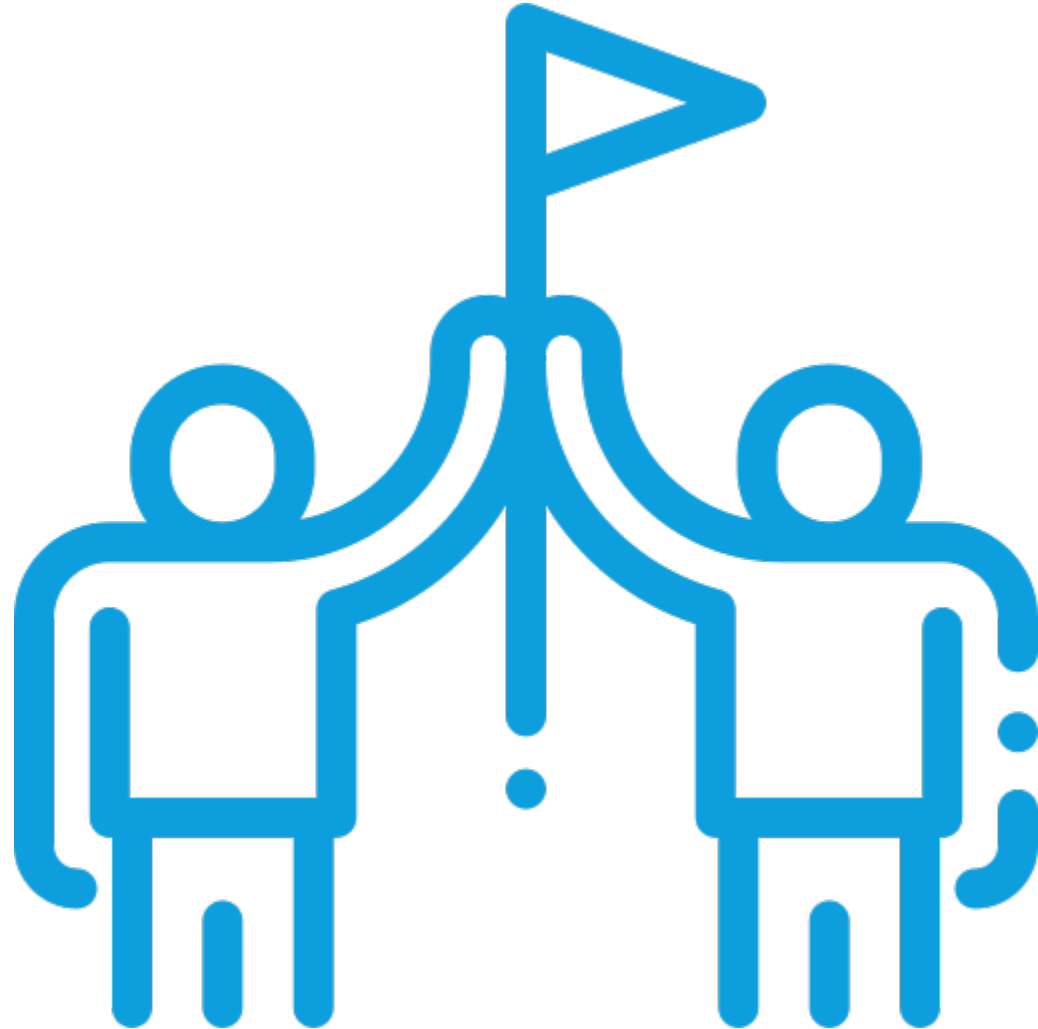
Coaching Communication Approaches

Generous Listening

- Notice your own listening (ratio of talking/listening)
- Be curious (listen to learn, not just to be polite)
- Listen for the content of the communication
- Listen for the feelings behind the words
- Listen for the unstated commitment of the speaker

Humble Inquiry

- Ask respectful, **open-ended questions** to reveal the person's thinking/knowledge
- Listen attentively
- Focus on the person, not the problem
- Support the person to solve her own problem
- Create space for curiosity and discovery
- Promote relationship-building

Giving Feedback

- Base comments on **objective observations**
- Be specific and genuine
- Use "I" statements
- Use "and" instead of "but"
- Simple ways to promote feedback:
  - "I wonder . . . "
  - "I don't want . . . AND I do want"
- Use a template to practice

Step up/Step Back

- **Step up** to fill a critical need that moves the group forward:
  - Skill/knowledge gaps
  - Share stories
  - Model facilitation
- **Step back** to provide space for others to act and take accountability
  - Use open-ended questions to invite action

Adopt Open Ended (Back Pocket) Questions

- What is the problem you are trying to solve?

- How would you describe what's happening vs. what should be happening?

- What makes you sure you have a cause/effect link?

- What have you thought of trying?

- What impact do you expect that change to have?

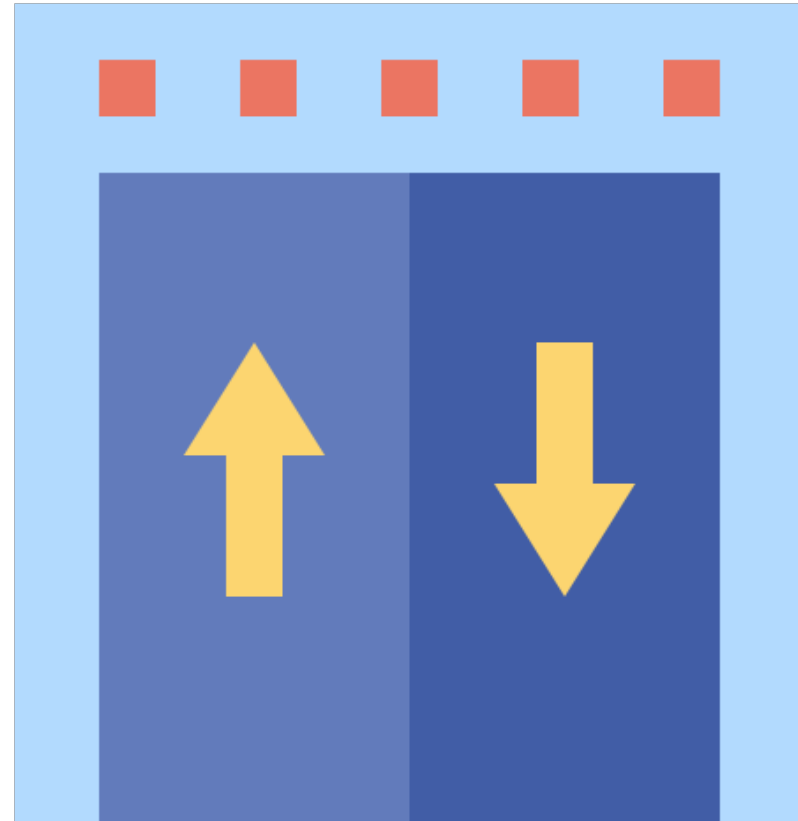- How might we make that happen?

- Can you say more about....?

Develop Your Elevator Pitch

- Prepare an elevator pitch to engage a clinic/practice to get involved in your QI project focused on improving chronic conditions (or other project you have planned)

10 MINUTES

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Instructions

- Find a partner – someone you do not know or work with

- Go on a walk (Set a timer)

  15 MINUTES

  – First 7 minutes: One person is the "speaker," practicing the elevator pitch and the other is the "listener," practicing communication approaches

  – Second 7 minutes: Switch places/roles

- Note: Do several rounds of sharing the pitch, getting feedback within the time allotted

How Did it Go?

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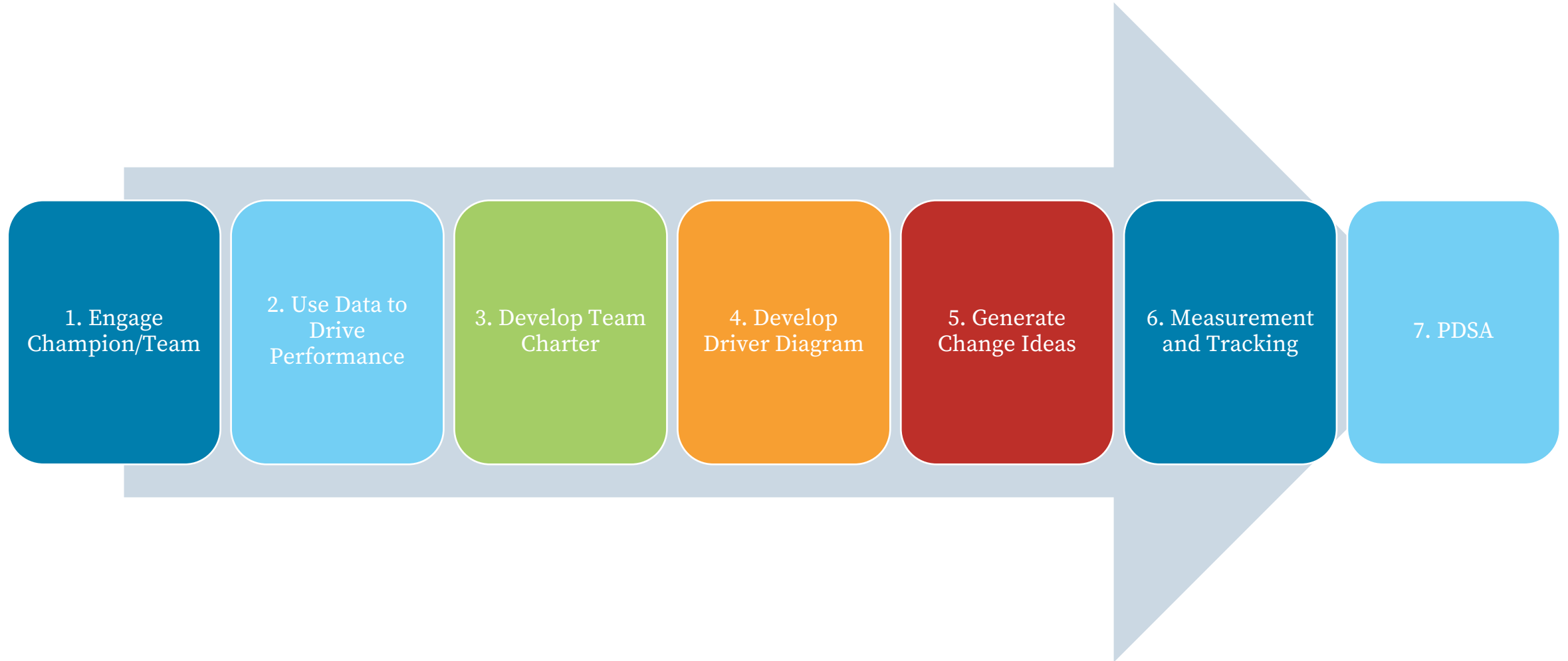
What Questions Do You Have?

Identify one of the most challenging situations you are having/have had/or anticipate having during kickoff activities with a team

About relationships....

| Dysfunctional | Avoid/Separate | Co-Exist | Transactional | Collaborative | Trusted |
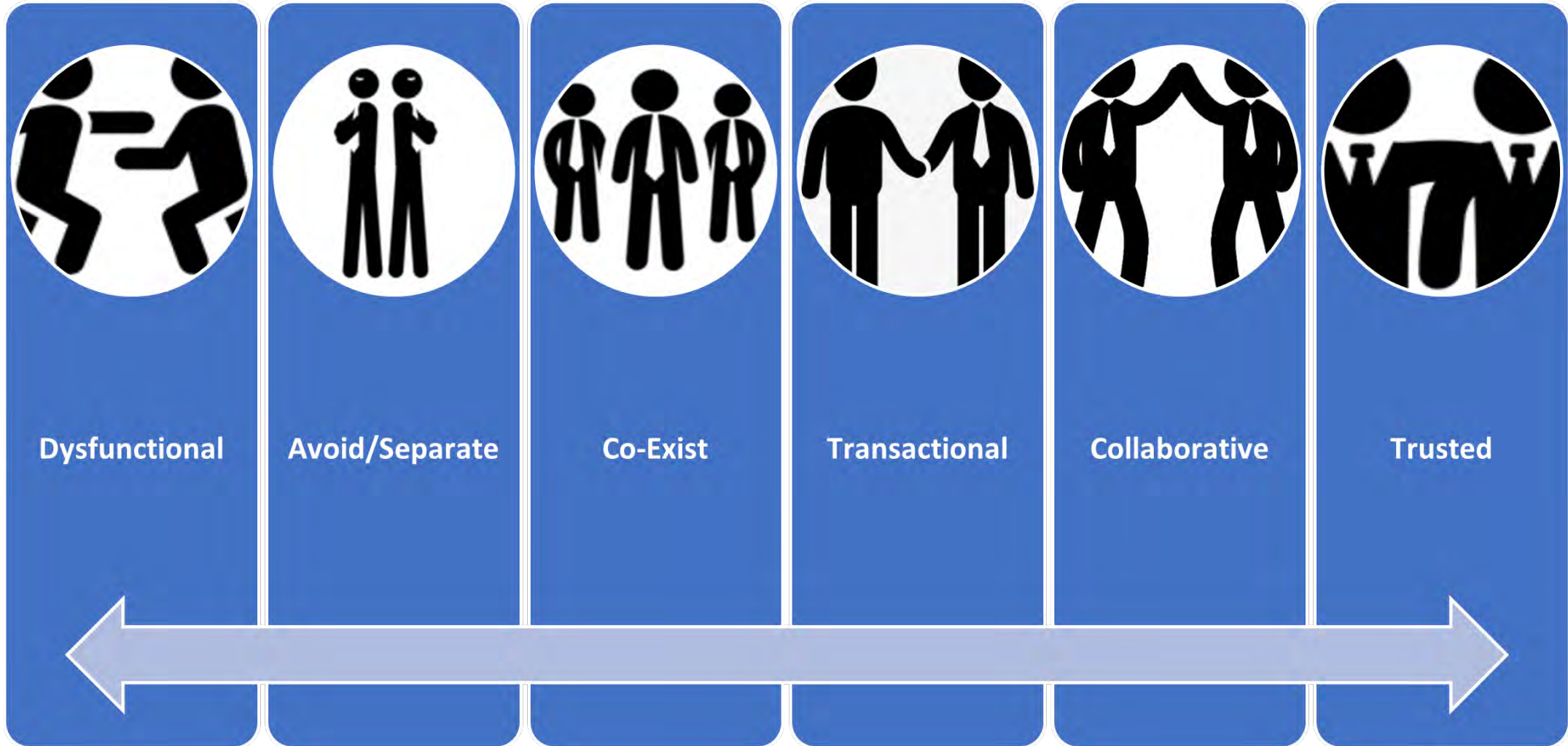
Improvement Coaching Road Map

1. Engage Champion/Team

2. Use Data to Drive Performance

3. Develop Team Charter

4. Develop Driver Diagram

5. Generate Change Ideas

6. Measurement and Tracking

7. PDSA

Armstorff Consulting

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Planning the Kickoff Meeting

- Create a standard kickoff meeting agenda template
- Adapt for each new project, as necessary

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The 8 Steps of Design

Part 1

- Who are the people?
- Why does this situation call for a meeting?
- What will change as a result of the meeting?
- When will it happen (time and timing)?
- Where will it happen?

Part 2

- What will we discuss (agenda items)?
- What are the achievement-based objectives (what will participants have learned/walked away with)?
- What are the discussion and learning tasks?

Global Learning Partners
Revolutionizing learning, transforming our world.
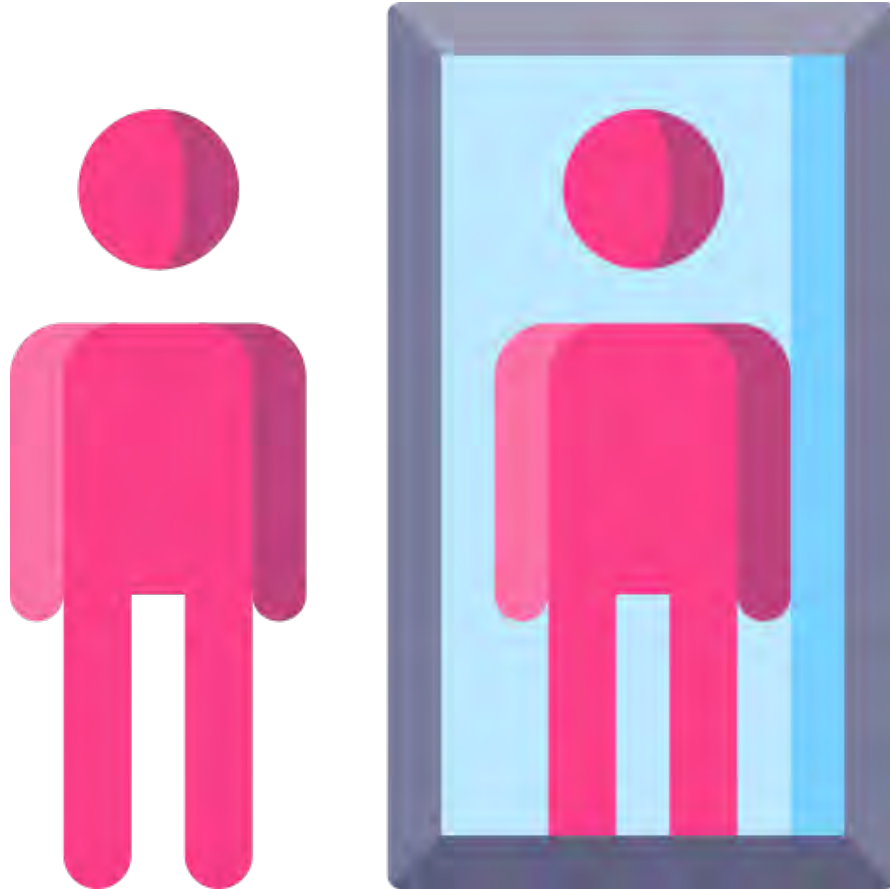
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Kickoff Meeting Design Tips

- Collaborate with the Improvement Team Lead to design the meeting

- Be realistic about prioritizing and sequencing agenda items

- Think of activities that can replace didactic content - help the team "discover"

- Prepare and practice how you will facilitate

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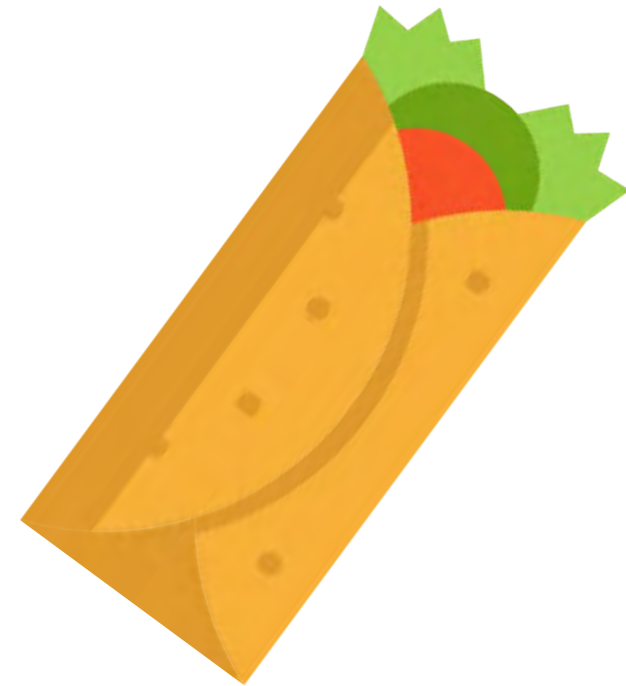
Be Present

- Observe

- Understand

- Reflect
  - Identify strengths
  - Acknowledge struggles

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Presence

- **Presence is** "a state of heightened awareness and attention in your moment-by-moment interactions with others, characterized by a sense of connection with the thoughts and feelings of those you hope to influence, motivate, and inspire."

Your Assignment . . . Design the Kickoff Meeting

In your table groups:

- Review the 8 Steps of Design Template

- Part 1 - partially started)
  - Is there anything you still need to know?

- Part 2 - Develop the kickoff meeting agenda
  - Timing, What, What For, How
  - Sequence, timing, and discussion/activity tasks)

- Please note the "so that" information

- Be sure to incorporate those items into your agenda in some way

15 MINUTES

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Example

Who

- Improvement Coach
- Improvement Team

Why?

- 40% of diabetic patients with uncontrolled A1c; disparity between Mandarin and English speaking patients; patients are at risk for heart attacks and strokes; missed opportunities for pay-for-performance monies

So That . . .

- Develop an aim statement for their project
- Develop relationships with coach/team members

When?

- Wednesday, 12:10 – 12:50 (40 minutes during lunch break)
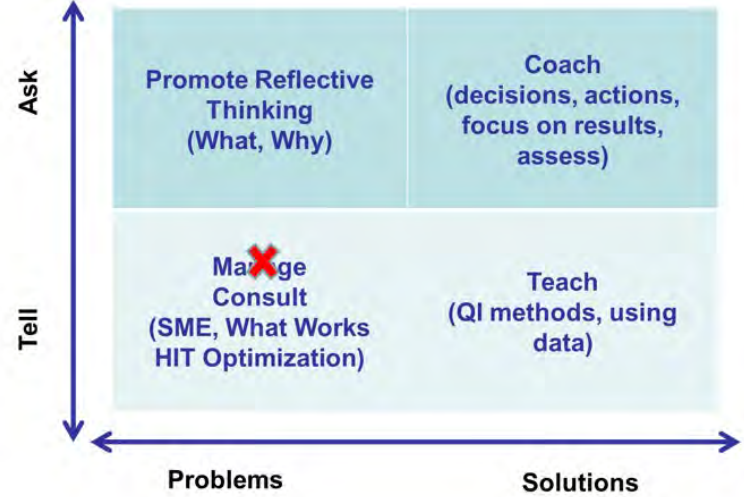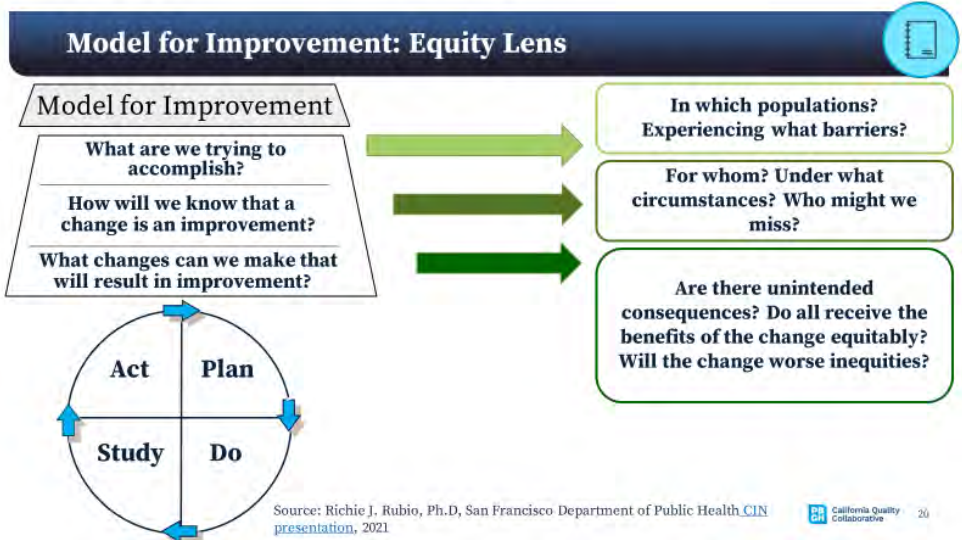
Where?

- Clinic Staff Room

Preparing for Change

Stump the Chump

How do I deal with resistant people?

COMMON RESISTANCE	NEEDS (to be met before change can happen)
Change Averse	• Safe place and encouragement to take small risks
Independent Lone Wolf	• Be involved in setting goals
Putting out fires	• Big picture perspective - Vision or strategy
Change Fatigue	• Focus, results, impact change directly
Everything is fine	• Buy-in to the vision
No urgency	• Reason for now rather than later
Resource Constraints	• Resources – time, $$, staff, IT tools
Competing Priorities	• Alignment or reduction in initiatives; clear communication
Tyranny of the Urgent	• Space and time to think and create
Lack of knowledge	• Learning Resources
Lack of skills	• Training and Practice

Utilizing your support network

Tools

Resources

Perspective

Feedback

Expertise

Experience

Validation

- Ask and offer a peer...
  - how to overcome a similar challenge
  - perspective on a difficult situation
  - a tool or resource used successfully
  - expertise on a particular subject
  - celebration!

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How do I deal with the most resistant people?

What Questions Do You Have?

IMPROVEMENT TEAM ROLES

- Improvement Coach
- Clinician
- Office Manager (Counterpart/Team Lead)
- Medical Assistant
- Patient
- Front Desk Receptionist
- Executive Sponsor (CEO)

TEAM OBJECTIVES

- Achieve the objectives outlined in your Kick-Off Meeting Agenda
- Draft AIM Statement (Measure and Goal) and write on flip chart

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ACTIVITY STEPS

Confirm your roles [5 min]

Channel a real person you know in that role

Represent your organization and the clinic/practice

Conduct the Kickoff Meeting [30 min]

Display Your Aim Statement

On a flip chart and post on the wall

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Where did you get stuck?

What were you challenged by?

Which techniques worked?

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Wrap Up

Thank you!

Peter Robertson
Senior Director,
Practice Transformation

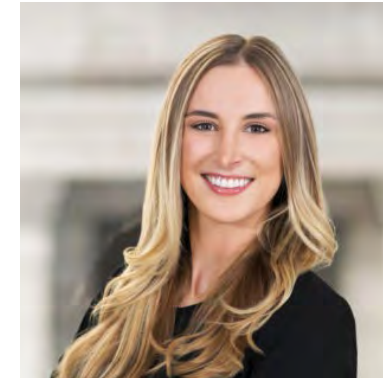**Kristina Mody**
Senior Manager,
Care Transformation

Felicia Skaggs
Senior Manager,
Behavioral Health Integration

Carol Flores
Senior Manager,
Equity & Transformation

Jose Ordonez
Data Analyst

Erika Lind
Manager, CQC Events &
Learning

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Help us improve our offerings!

Before you leave please take a minute to complete the event evaluation form.

The Last Word . . .

- Identify and share one word that would best describe your experience over the past two days

THANK YOU

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