



Quality Coach

# Programme Leader Guide

Quality Coach Development Programme



# Quality Coach



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# Contents

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<b>What Is the Quality Coach Development Programme and Why Should We Consider It?</b>	<b>5</b>
Foreword from the Editors	6
Key Questions about the Quality Coach Development Programme	8
Further Reading	17
<b>Delivering the Quality Coach Development Programme</b>	<b>18</b>
Getting Started as a Programme Leader	19
<b>Step 1:</b> Read the Programme Leader Guide	21
<b>Step 2:</b> Identify your Programme Sponsor and Discuss the Feasibility of Running the Programme	24
<b>Step 3:</b> Agree the Scope and Outcomes of the Programme	25
<b>Step 4:</b> Identify and Recruit Faculty Experts	28
<b>Step 5:</b> Sort Out the Logistics of the Programme	31
<b>Step 6:</b> Recruit Delegates and the Wider Faculty	35
<b>Step 7:</b> Deliver the Taught Content	37
<b>Step 8:</b> Reflect On and Review the Programme and Consider Next Steps	38
Glossary	39



# Welcome to the Programme Leader Guide for the Quality Coach Development Programme.

This guide has been designed for individuals or teams who are interested in running the Quality Coach Development Programme in their organisation or system.

This guide aims to provide a high-level overview of the programme, including how you might run the programme and adapt it for your local context. It is set out in two parts:

- Part A → outlines what the Quality Coach Development Programme is and why you should consider it
- Part B → is the high-level 'how to' guide for the programme.

Before you start implementing the Quality Coach Development Programme you should read this guide and the Trainer Guide in full.



## Part A

# *What Is the Quality Coach Development Programme and Why Should We Consider It?*

## Foreword from the Editors

**Quality and safety are the most important priority for all organisations across the health and care sector. All providers aim to deliver high-quality, timely, effective, safe and person-centred care. Where gaps in care delivery exist, they aim to improve the service provided. In support of this ambition, many providers have adopted a quality improvement approach as one strategy to improve healthcare outcomes, service user experience, staff morale and to build efficiency across the system.**

Quality improvement (QI) can be defined as 'giving the people closest to issues affecting care quality the time, permission, skills and resources they need to solve them. It involves a systematic and coordinated approach to solving a problem using specific methods and tools with the aim of bringing about a measurable improvement' ([Health Foundation, 2021](#)).<sup>1</sup>

For many health and care providers the broad improvement ambition is that everyone who is involved in care delivery, i.e. staff, service users and the public, are aiming to improve services every day. There is a recognition that improvement is everyone's job. By empowering all staff at all levels of an organisation, we can address complex and systemic issues. Staff closest to the issues we face can use their invaluable insights, experience, and expertise to improve services.

The ambition of everyone improving all the time is commendable. But the reality of all healthcare professionals embodying continuous improvement principles brings about clear challenges. Primarily, how does everyone receive the support they need to improve services?

In many healthcare organisations, including most National Health Service (NHS) providers, staff are currently only able to seek QI support through a centralised improvement team. Whilst this is reasonable for organisations with little QI activity, it may not be a sustainable model in the longer term. In recent years there has been a significant increase in the demand for QI support and training. Organisations may not be able to justify employing a growing number of improvement specialists in a centralised team in order to support bottom-up improvement work; instead new approaches need to be sought.

<sup>1</sup> The Health Foundation (2021). Quality improvement made simple. What everyone should know about health care quality improvement. [www.health.org.uk/sites/default/files/QualityImprovementMadeSimple.pdf](http://www.health.org.uk/sites/default/files/QualityImprovementMadeSimple.pdf)

One approach that has been shown to work in NHS organisations is to train a network of frontline staff in the more advanced concepts of improvement, as well as coaching techniques – i.e. training them to become Quality Coaches. The approach has been advocated for by the NHS and its advisers for several years (NHS Improvement, 2017;<sup>2</sup> Lloyd, R. 2018).<sup>3</sup> This programme supports organisations to adopt this approach, by training staff in the knowledge and skills needed to be a Quality Coach.

Quality Coaches play a pivotal role in supporting improvement within health organisations and across health systems. In their role, they should have protected time to support services and colleagues with the planning, implementation, and evaluation of QI work. Through the Quality Coach role, improvement support is distributed throughout the system, as opposed to being in a centralised function. More advanced and specialist support and general training is then the main provision of the central QI team/function.

The aim of the Quality Coach Development Programme is to build improvement capability and capacity by training staff in the essential skills and knowledge needed to successfully coach teams and individuals through QI work. The programme has been designed and developed by a dedicated group of national subject matter experts from across the QI community in the UK, between Autumn 2019 and April 2023. The programme has been partially funded and supported by the Q Exchange programme, hosted by the Q Community<sup>4</sup> and funded by NHS England and the Health Foundation. Further funding and oversight in the development of this programme has been provided by Central London Community Healthcare NHS Trust.

With sufficient local support for QI through the development of Quality Coaches, we can continue to ensure that staff are empowered and supported to implement their ideas for improvement across the United Kingdom (UK) and Ireland.

We hope you enjoy this programme and put your learning into practice to work towards our shared goal of an improved healthcare system.



**Sidney Beech**  
Editor

On behalf of the Quality Coach Design Group



**Hannah Pearson**  
Editor

2 NHS Improvement (2017). Building capacity and capability for improvement: embedding quality improvement skills in NHS providers. <https://qi.eft.nhs.uk/resource/building-capacity-and-capability-for-improvement/>

3 Lloyd, R. (2018). Building improvement capacity and capability. *Healthcare Executive*.

4 <https://q.health.org.uk/about/>

# Key Questions about the Quality Coach Development Programme

## By the end of this section, you will:

- Understand the benefits of QI coaching, and the advantages of this programme over others
- Know the key details and contents of the programme, and the resources required
- Learn how to assess if your organisation is ready to develop Quality Coaches.

## 1 What are the benefits of developing Quality Coaches?

Through the Quality Coach role, improvement support is distributed throughout the system, as opposed to being in a centralised function. By empowering all staff at all levels of an organisation, we can address complex and systemic issues. Staff closest to these issues can use their invaluable insights, experience, and expertise to improve services. There is significant research in medical literature about the positive impact quality improvement work can have on the delivery of safe, efficient and effective patient care. The [Care Quality Commission \(2018\)](#)<sup>5</sup> states 'QI has been shown to deliver better patient outcomes, and improved operational, organisational and financial performance when led effectively, embedded through an organisation and supported by systems and training.' Below, we describe the benefits QI coaching can bring to your patients, organisation and staff.

### Patients

The NHS England and NHS Improvement's [\(2019\) Patient Safety Strategy](#)<sup>6</sup> states 'more can be done to share insight and empower people – patients and staff – with the skills, confidence and mechanisms to improve safety.' The vision behind this strategy is to continuously improve safety through:

- 'improving understanding of safety by drawing intelligence from multiple sources of patient safety information (Insight)
- equipping patients, staff and partners with the skills and opportunities to improve patient safety throughout the whole system (Involvement)
- designing and supporting programmes that deliver effective and sustainable change in the most important areas (Improvement)'

The NHS Patient Safety Strategy promotes the use of QI for continuous improvement in healthcare, especially with regards to patient safety. It states that QI programmes support effective and sustainable change in all areas of healthcare, utilising all stakeholders to maximise cohesion. It provides evidence-based interventions and implementation methodologies to achieve desired outcomes.

Using the experiences and expertise of Quality Coaches, organisations can tackle key safety priorities through new improvement work. Coaches are ideally placed to provide support, in partnership with patients, to address local issues.

5 The Care Quality Commission (2018). Quality improvement in hospital trusts. [www.cqc.org.uk/sites/default/files/20180911\\_QI\\_hospitals\\_FINAL.pdf](http://www.cqc.org.uk/sites/default/files/20180911_QI_hospitals_FINAL.pdf)

6 NHS England (2019). The NHS Patient Safety Strategy. [www.england.nhs.uk/patient-safety/the-nhs-patient-safety-strategy/](http://www.england.nhs.uk/patient-safety/the-nhs-patient-safety-strategy/)

## Organisation

Embedding QI throughout an organisation requires a systematic, targeted effort, such as Lloyd's 'dosing' approach,<sup>7</sup> to develop different levels of QI expertise for different groups of people.

Many people who are trained in QI methods struggle to apply them in practice due to the complex nature of healthcare systems and the gap between QI theory and practice. The role of the Quality Coach is to help staff to bridge this gap. Moreover, coaches help to embed a culture of continuous improvement at the front line, given QI work is identified and addressed *in situ*. De-centralising QI support from a corporate QI team to the local level reinforces the idea that QI is everybody's job, and is not left to a select few. It also provides an opportunity to spread enthusiasm for QI from the coach to their colleagues locally.

There is a financial benefit to this programme and the role of coaches in an organisation. As the appetite for QI increases, we need to find a pragmatic and sensible way to support all QI work without employing a very large improvement team. By embedding the Quality Coach role into a small proportion of staff members' job plans, health and care providers are able to support QI without the recruitment of additional staff. A detailed case study from East London Foundation Trust (ELFT) – [Evans \(2018\)](#)<sup>8</sup> and [O'Sullivan \(2021\)](#)<sup>9</sup> – on the return on investment in QI is outlined in the further reading. It should be noted that ELFT have a large contingent of coaches that form part of their formal QI offer in the Trust. Should you choose to proceed, you will be joining a diverse and large group of organisations that use this programme to develop Quality Coaches within their organisation.

## Staff

This coaching programme offers an opportunity for further professional development in the field of improvement. It is well established that when staff are engaged, empowered and supported in their roles, particularly with regard to change and improvement, we see higher levels of retention of all staff. This is described in [West et al's \(2020\)](#)<sup>10</sup> work on compassion in care. [The Care Quality Commission \(2018\)](#) also states 'when we visit Trusts that have an established QI culture, they feel different. Staff are engaged, they are focussed on the quality of patient care, and they are confident in their ability to improve.'

This programme may be a useful tool to harness the passion for QI within all health and care organisations. By harnessing this passion, we can distribute agency for change across all levels of an organisation or system.

As improvement is an essential leadership and management skill, Quality Coaches will be able to use their coaching skills within their substantive role to identify and enable potential areas of improvement, as well as empowering the people around them. This embeds QI at a frontline local level, whilst improving the general skill mix of individuals and teams.

Delegates of the programme will be actively coaching QI work from within two months of starting the programme – resulting in increasing QI coaching capability and capacity. In order to qualify as a coach and graduate from the programme, coaches must show good evidence of applied learning through coaching team(s). This approach fosters reflection, learning, and reciprocity amongst candidates.

7 Lloyd, R. (2018). Building improvement capacity and capability. *Healthcare Executive*.

8 Evans, N. (2018). Quality improvement and collaborative working: partnerships across services in East London, Bedfordshire and Luton. [www.kingsfund.org.uk/blog/2018/11/quality-improvement-and-collaborative-working-partnerships-across-services-east-london](http://www.kingsfund.org.uk/blog/2018/11/quality-improvement-and-collaborative-working-partnerships-across-services-east-london)

9 O'Sullivan, O.P., Chang, N.H., Baker, P. and Shah, A. (2021). Quality improvement at East London NHS Foundation Trust: the pathway to embedding lasting change. *International Journal of Health Governance*. <https://doi.org/10.1108/IJHG-07-2020-0085>

10 West, M., Bailey, S., Williams, E. (2020). The courage of compassion: Supporting nurses and midwives to deliver high-quality care. [www.kingsfund.org.uk/sites/default/files/2020-09/The%20courage%20of%20compassion%20summary\\_web\\_0.pdf](http://www.kingsfund.org.uk/sites/default/files/2020-09/The%20courage%20of%20compassion%20summary_web_0.pdf)

## 2 What are the key details of the Quality Coach Development Programme?

The content of the programme covers (see question 6 → for further detail):

- Understanding self
- Coaching and Foundations of Improvement
- Working with People
- Coaching Measurement
- Human Side of Change (supplementary depending on organisation's need).

This programme could take six to nine months to deliver depending on your organisation's faculty capacity, and on the amount of **supplementary** content included (further explanation in question 7 → regarding **core** and **supplementary** content). The resources required for your organisation/system to deliver this programme are outlined in question 8 → of this summary.

Please note that your organisation and its staff would need to deliver the programme content; the authors do not provide any training and have instead created this programme and its content as a national standard and resource pack for you to use at no cost.

## 3 Why should you select this coaching programme over other programmes?

In your research on this programme you may have come across a number of development programmes on the market. The purpose of each of these programmes varies but broadly the objective is to develop people as improvement coaches. The focus and content of these programmes are diverse and typically they are tailored to work with the approach that is favoured by the organisation that developed it.

The majority of these programmes are delivered by an external organisation, and some can be very costly. This programme has been designed to provide a free, 'off the shelf', easily replicable, high quality development programme that can be adapted to support your organisation to build improvement capacity and capability. The content has been created with a comprehensive trainer guide and notes to support robust delivery by your trainers and QI faculty; therefore the main benefit of this programme is to reduce the burden of designing a new programme from scratch.

### Key benefits of this programme over other development programmes:

- The materials have been designed by a group of UK QI subject matter experts
- The resource is completely free to adopt and use as required
- The programme content is adaptable and can be tailored to your organisation's or system's needs
- This is a national programme that many organisations have already adopted
- This programme can be delivered at a single or multi-organisation level, which enables increased capacity and capability to deliver the content
- There are opportunities to collaborate outside of your local system including:
  - Joining a national network of 'qualified' Quality Coaches
  - Joining the national faculty of Improvement Coach Trainers.

## 4 Is this programme formally accredited?

This programme is currently not accredited; however, the authors are exploring accreditation through Higher Education Institutes and/or the Q Community as of 2023. Organisations are welcome to apply for CPD accreditation. Please note that there is a cost associated with this that would need to be met by your organisation.

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By law you must acknowledge the authors and not remove the © symbol or names. This includes any submissions made for CPD accreditation.

## 5 How do we ensure and agree on protected time for coaches?

The formal agreement of protected time for Quality Coaches is outside the remit of this guide and the programme itself. The process for achieving an agreement is highly specific to each individual organisation. Below we provide some key considerations to help you start this discussion within your organisation.

Protecting time for Quality Coaches is never simple and there is no standard way to achieve this. We suggest you review the [NHS Improvement \(2017\)<sup>11</sup>](#) report *Building Capacity and Capability for Improvement*, and [Jones et al's \(2019\)<sup>12</sup>](#) *The Improvement Journey. Why Organisation-wide improvement in health care matters, and how to get started*, as a start. Additionally there is ongoing work within the NHS regarding job planning (2020);<sup>13</sup> for those working within the NHS, it may be prudent to use this guidance and process to enable the addition of Quality Coach work into a person's 'Additional NHS/Trust Responsibilities'.

If we adopt QI as our approach to complex problem-solving, then we must ensure that we find space for this, by reviewing and reducing other work. This is not a simple task. It requires the support and commitment of organisational leadership to integrate QI into people's roles, including Quality Coaches. For this to occur, leaders need to understand the benefit this change could bring.

Without protected time to support and coach colleagues that are leading QI work, it is highly unlikely that you will achieve the benefits from this programme. The day to day work can quickly overwhelm even the most avid QI practitioner, and the valuable skills learned on this programme can be forgotten as quickly as they were learned.

You may wish to connect with like-minded individuals to understand their approach using the Q Community's ['Coaching Improvement'](#)<sup>14</sup> Special Interest Group, as well as the NHS Futures platform.

11 NHS Improvement (2017). Building capacity and capability for improvement: embedding quality improvement skills in NHS providers. [https://qi.eft.nhs.uk/wp-content/uploads/2017/09/01-NHS107-Dosing\\_Document-010917\\_K\\_1-1.pdf](https://qi.eft.nhs.uk/wp-content/uploads/2017/09/01-NHS107-Dosing_Document-010917_K_1-1.pdf)

12 Jones, B., Horton T., Warburton, W. (2019). The improvement journey: Why organisation-wide improvement in health care matters, and how to get started. [www.health.org.uk/publications/reports/the-improvement-journey](http://www.health.org.uk/publications/reports/the-improvement-journey)

13 NHS England and NHS Improvement (2020). E-job planning the clinical workforce. [www.england.nhs.uk/wp-content/uploads/2020/09/e-job-planning-guidance.pdf](http://www.england.nhs.uk/wp-content/uploads/2020/09/e-job-planning-guidance.pdf)

14 <https://q.health.org.uk/community/groups/coaching-improvement/>

## 6 Is my organisation/system ready to develop Quality Coaches?

This programme may not be suitable for organisations who are near the start of their improvement journey. We suggest you read [Jones et al's \(2019\) Health Foundation report \*The Improvement Journey\*](#) to gauge the maturity of your organisation in regards

to QI (think about the climate, infrastructure, leadership and governance). As a rough guide, typically organisations at steps 4 or above are in a better position to test and embed a coach role. However, there is no strict rule on this.

### Key questions to consider as a Sponsor or Programme Leader:

- Do all members of the Executive team (or equivalent) fully endorse and support the use of QI in the organisation?
- Do you have a QI strategy (or similar) that everyone has agreed to?
- Does the wider organisation subscribe to QI? Think about the support from senior and middle managers as well as engagement in QI work and training from frontline staff.
- Is there a sufficient 'pool' of staff who have experience of QI and are willing and ready to become a coach?
- Does QI align to organisational needs, objectives and priorities, or is it seen as a separate entity?
- Does your organisation have a defined model for developing improvement capability? For example the use of the 'dosing approach', as outlined in the [NHS Improvement \(2018\) report \*Building capacity and capability for improvement\*](#).

There are no right or wrong answers, but use these questions to reflect on your organisation's readiness. If you would like to formally analyse your organisation's readiness for QI, a useful resource is [Jones et al's \(2017\)<sup>15</sup> \*How do hospital boards govern for quality improvement? A mixed methods study of 15 organisations in England\*](#).

It is crucial to also think about how coaches are supported in the continuation of their role beyond this programme. This is beyond the scope of this guide. Factors to consider and resolve in your organisation include (but are not limited to):

- How will coaches be supported in their continued development in the ever-evolving field of QI?
- How will coaches be supervised to assure the quality of their coaching?
- How will you ensure coaches are working on key organisational/system priorities?
- What are the formal and informal relationships between coaches, the improvement team, operations and other key stakeholders?

<sup>15</sup> Jones L, Pomeroy L, Robert G, et al. (2017). How do hospital boards govern for quality improvement? A mixed methods study of 15 organisations in England. *BMJ Quality & Safety*. <https://qualitysafety.bmjjournals.com/content/26/12/978>

## 7 What does the content of the programme cover?

An outline of the content is shown in the table below. There is a strong emphasis on active, experiential and project-based learning throughout the programme. Your faculty should ensure that delegates are enabled to coach and support local teams through QI work. This will ensure that the focus of the programme is entirely practical and not just theoretical.

Module	Session	Session detail
Pre-programme	-	<ul style="list-style-type: none"><li>Understanding self, reflective practice and a refresher of quality improvement.</li><li>How the programme will work and setting expectations from the start.</li></ul>
Coaching and the Foundations of QI	1	<ul style="list-style-type: none"><li>How QI relates to other change approaches, such as audit, research, transformation etc.</li><li>The fundamental skills and knowledge every coach needs such as GROW coaching, coaching an aim and the common challenges in coaching QI.</li></ul>
	2	<ul style="list-style-type: none"><li>How to contract as a coach and a first go at coaching.</li></ul>
Working with People	3	<ul style="list-style-type: none"><li>How to foster good relationships within teams.</li><li>How Liberating Structures can support good and fair participation in group discussion.</li></ul>
	4	<ul style="list-style-type: none"><li>Context, culture, and sustainability, and how contextual factors can make or break QI work.</li></ul>
	5	<ul style="list-style-type: none"><li>Strategies to advocate for better inclusion and engagement of patients. Coaches are also given the chance to individually teach a technical concept.</li></ul>
Coaching Measurement	6	<ul style="list-style-type: none"><li>How to use data to support teams, breaking down measurement into easy, practical methods.</li><li>How to use Statistical Process Control (SPC) charts, a common feature of many providers' reports, as well as improvement work.</li></ul>
Human Side of Change	7	<ul style="list-style-type: none"><li>How to apply an evidence-based model to support behaviour change, and how to use a simple model for framing resistance to change.</li></ul>
	8	<ul style="list-style-type: none"><li>How to use change concepts and creative thinking to promote new ideas to tackle a problem.</li><li>Next steps as a coach.</li><li>Preparation for the final assessment (where applicable).</li></ul>

Sessions 7 and 8 are accredited as supplementary content (see next page for detail). This means that although the material covered is useful, it is not essential to know as a Quality Coach. Many organisations have still decided to include this content as part of their delivery – however this is a decision for you to make based on capacity, capability, organisational need and other factors.



## 8 What resources are needed to deliver this programme?

Description	Commitment and competencies
<b>Sponsor</b> <ul style="list-style-type: none"><li>• Responsible for and committed to the development of QI capability in your organisation/system (typically a member of Trust Board or equivalent)</li><li>• Lead and guide your organisation through the set-up of the programme</li><li>• Unlocking the resources to run a cohort of the programme</li><li>• Working with leadership in the organisation to secure and agree protected time for Quality Coaches.</li></ul>	<ul style="list-style-type: none"><li>• <b>Time:</b> Around one to two hours per week throughout the entirety of the programme</li><li>• Champion the programme by being a visible presence in key forums and through raising profile and advocating for the programme</li><li>• Attendance at coaching circles to understand the progress, experiences and challenges of staff on the programme</li><li>• Leading key programme events (e.g. opening, celebration) and engaging with delegates.</li></ul>
<b>Programme Leader</b> <i>(May also serve a dual role as the QI Lead—see below)</i> <ul style="list-style-type: none"><li>• Responsible for the set-up, planning, delivery and evaluation of the Quality Coach Development Programme cohort, in line with the guidance of this resource</li><li>• Influence the organisation at a senior and operational level</li><li>• Create, guide and manage the governance/assurance structure for the programme</li><li>• Recruit a faculty to deliver the programme, including QI Lead, trainers and extended faculty</li><li>• Oversee the recruitment of delegates to the programme.</li></ul>	<ul style="list-style-type: none"><li>• <b>Time:</b> Approximately two days per week throughout the entirety of the programme (if delivered over a six to nine month period)</li><li>• During the planning and set-up phase, will typically require around two days prep for each day of delivery</li><li>• Ideally has previous experience of running projects/programmes and experience of managing a training programme</li><li>• Able to influence at all levels of the organisation.</li></ul>
<b>QI Lead</b> <ul style="list-style-type: none"><li>• Responsible for ensuring that the programme is aligned to the local approach to QI and the organisational plan for QI capacity building</li><li>• Involved in the set-up, planning, delivery and evaluation of the programme</li><li>• Responsible for leading the adaptation of programme content as a subject matter expert</li><li>• Support the Programme Lead with the recruitment of a QI faculty to deliver and facilitate the sessions.</li></ul>	<ul style="list-style-type: none"><li>• <b>Time:</b> Varies depending on level of adaptation of the content, but may equate to around one day per week for three to six months</li><li>• Highly experienced QI practitioner and leader, serving as the organisation's authority on the design and delivery of the programme.</li></ul>

Description	Commitment and competencies
<b>Trainers and programme faculty</b> <ul style="list-style-type: none"><li>Deliver the content in line with the guidance provided in the training resource pack</li><li>Serve as programme faculty/coaches to delegates on the programme, providing expert guidance and support.</li></ul>	<ul style="list-style-type: none"><li><b>Time:</b> Approximately two days to support the planning and delivery of programme content for each taught day (20 days total if taught over 10 days). Will vary depending on the size of the cohort</li><li>Skilled and knowledgeable QI practitioners</li><li>Considerable experience of coaching QI work</li><li>Experience of teaching.</li></ul>
<b>Mentors</b> <ul style="list-style-type: none"><li>Coach the delegates during sections of the course</li><li>Assist and monitor completion of self-directed tasks</li><li>Act as critical friend to reflect application of content to coaching situations.</li></ul>	<ul style="list-style-type: none"><li><b>Time:</b> Ad hoc through the course content; likely one hour every two weeks during duration of course</li><li>Skilled and knowledgeable QI practitioners</li><li>Considerable experience of coaching QI work.</li></ul>

### Other considerations:

- Designated administrative support for the Programme Leader
- Evaluation support, such as a Data Analyst
- Communications and engagement input
- IT support (especially if running the programme virtually)
- Education support

We suggest that your organisation establishes a working group to consider how Quality Coaches fit into your QI strategy and how they will be supported to undertake their coaching activities. This working group should have good representation from the QI team, your faculty, senior leadership, operational teams/management and frontline staff.

### What should you expect as a Sponsor?

The success of the programme relies heavily on your endorsement and support of it, and the role of the Quality Coach within your organisation. This may involve the agreement at an Executive meeting (or equivalent) to release staff to attend this programme and to receive ring-fenced time in their new roles. Without this protected time the role provides little return on investment (see above).

As the Sponsor, you may need to influence key stakeholders to ensure staff have opportunity to apply to this programme, and to address barriers or obstacles to the success of the programme.

The key outcome of the programme will be a contingent of newly trained Quality Coaches who can be embedded within services to support QI work *in situ*. You should work alongside the programme faculty to support their growth and development in these new roles.



# Further Reading

Health Foundation. About the Q Community. <https://q.health.org.uk/about/>

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## Patients

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## Organisation

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## Part B

# *Delivering the Quality Coach Development Programme*

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# Getting Started as a Programme Leader

## By the end of this section, you will:

- Have an overview of what skills and knowledge are needed
- Understand the roles and responsibilities of the Programme Leader
- Have been introduced to the eight steps involved in delivering the programme.

## *What skills and knowledge do I need to be able to deliver this programme?*

As the Programme Leader, you should have some previous experience of running a training programme. You will be responsible for the successful planning and execution of the programme. You should have some experience of project/programme management to help you with this. You should consider where your strengths and weaknesses lie, and seek mentorship and guidance from others, as much or as little as needed.

The skills, knowledge and competencies that you and your faculty need in order to deliver the programme content are outlined in this guide, as well as in the Trainer Guide. Please use the [Faculty Expert Matrix](#) on page 30 to facilitate allocation of resources (including people) to prepare and deliver the taught content.

Ideally you will be an experienced QI coach and leader within your organisation. If this is not the case, then you should identify an individual within your organisation to act as the authority on QI as part of the programme. The QI lead is responsible for reviewing, tailoring and/or adapting the taught content (at a high level) to meet the needs and maturity of your organisation.

Excellent communication and influencing skills are required to ensure this programme is well-received and coaches are embedded within the organisation.

## Roles and responsibilities of the Programme Leader

- Lead on the set-up, planning, delivery and evaluation of the Quality Coach Development Programme cohort, in line with the guidance of this resource
- Influence the organisation at a senior and operational level, in support of the successful delivery of this programme
- Finalise the scope, aims and objectives of the programme locally
- Create, guide and manage the governance/assurance structure for the programme
- Recruit a faculty to deliver the programme, including QI Lead, trainers and extended faculty
- Act as the professional link between the Programme Sponsor and faculty
- Oversee the recruitment of delegates to the programme
- Provide mentorship and pastoral support of faculty
- Oversee and ensure a process of mentorship and support for delegates
- Work alongside the faculty to ensure underperforming and/or disengaged delegates are supported to complete the programme or exit the programme, in partnership with their managers
- Ensure a robust review process is in place to provide reflection and learning opportunities for faculty members
- Complete a deep-dive review at the end of the programme with key stakeholders to determine ongoing feasibility and next steps e.g. iteration of aims, objectives, programme delivery content.

## The eight steps you should follow to deliver this programme

To help you kick-start the delivery of this programme, we have identified eight key steps that you should follow. We will break these steps down with further tips and advice over the coming pages of this guide.

- 1 Read the Programme Leader Guide (this document)
- 2 Identify your Programme Sponsor and discuss the feasibility of running the programme
- 3 Agree the scope and outcomes of the programme
- 4 Identify and recruit faculty
- 5 Organise the logistics for the programme
- 6 Recruit delegates
- 7 Deliver the taught content
- 8 Reflect on and review the programme and consider next steps.

These steps focus solely on the training and development of Quality Coaches through the programme. We have *not* included the additional work that you may need to undertake around the *role* of the coaches within your organisation. You will need to consider the logistics of embedding and supporting coaches during and upon completion of the programme. One strategy to address this is to establish a working group, but this is dependent on your local environment. We have provided an example role description for a Quality Coach on page 100 in the handbook, but the detail of this will need to be tailored to suit your needs.

**Please note:** The authors have generously provided this programme and its content and materials for free, as long as you comply with copyright law. Whilst the content is provided by the authors, we have no responsibility for the delivery of content – this lies with your organisation and you.

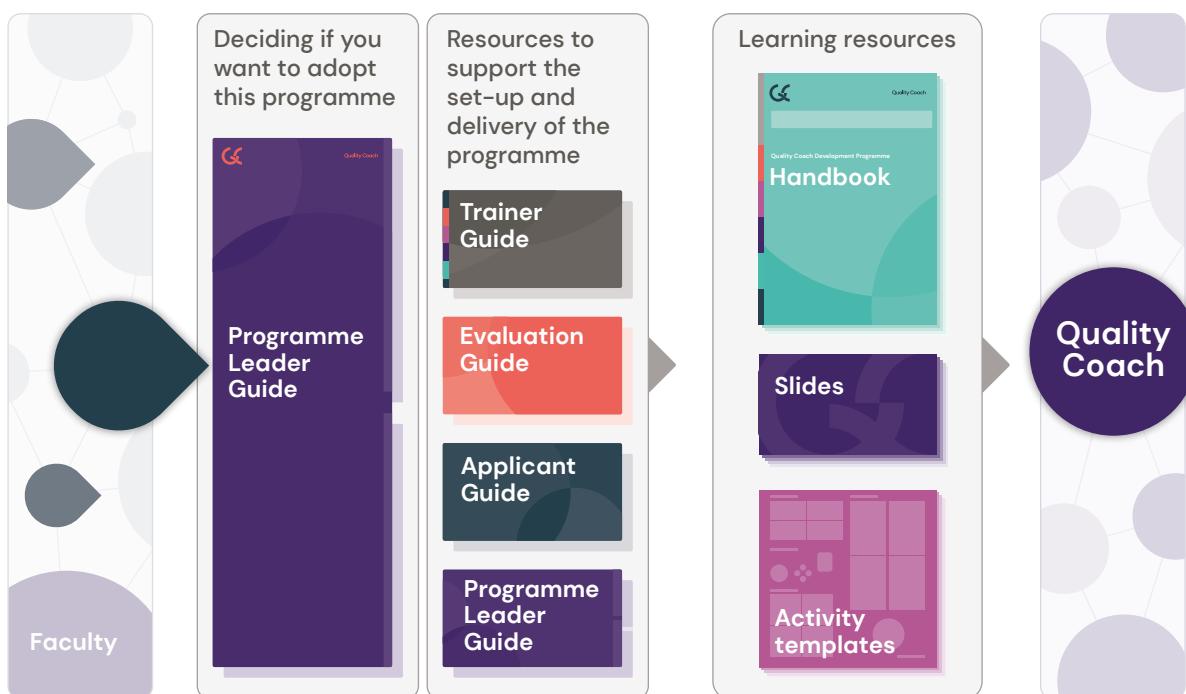
STEP 1

# 1 Read the Programme Leader Guide

## By the end of Step 1, you will:

- Understand what the Programme Leader Guide is, and what other guides and resources are available.

The Programme Leader is responsible for the overall coherence, planning, delivery, evaluation and iteration of the Quality Coach Development Programme within an organisation. Within the role you will work closely with a faculty of experts and educators, the Sponsor, QI team, delegates and their managers, amongst others. You should read this guide in full in order to understand your role and how you might deliver this programme locally. You should decide whether this programme is suitable to adopt, and if it is then you will proceed to Step 2. If you do decide to proceed then some of the following steps in this guide may need to run concurrently for efficiency.



# Programme Resources

**A full pack of resources has been created to support you in the delivery of the Quality Coach Development Programme:**

## *Taught content*

### Slide sets for all sessions

- Complete slide sets have been created based on the key subject areas that have been proven to be necessary and important in developing as a Quality Coach
- The slides include full slide notes as an indicator of what could be said. Slide notes include notes in bold, which are instructions for the faculty, and notes in regular text for delegates, which can be read out during the sessions or adapted as required. We strongly encourage a full review of slides by the individual(s) who deliver them, in support of adaptation or tailoring of content. Bringing your own personality, individual teaching style and experiences are key to effective delivery of the content
- Activities are built into all sessions and explained in the slide sets in some detail. Further detail is given in this guide in the activity guides for each session
- The slides have been tested over several sites and the structure, layout and order reflect our learning on the best layout of the programme.

### Handbook

- A handbook has been created for delegates of the programme as a companion to the slides. It provides detail on all subjects covered over the eight taught sessions, as well as some key insights as part of the pre-programme content. At times, more content is provided in the handbook than in the slides, so we encourage you to read any sections that cover the content you are teaching
- The slides reference handbook page numbers in support of learning.

# Programme guides

## Programme Leader Guide

This guide provides both an executive summary on the programme as well as a practical 'how-to' guide on delivering and managing the programme from set up, planning and delivery, through to evaluation

- This document is aimed at several key people:
  - The person who is likely to 'own' the delivery of the programme (e.g. Head of QI, Head of Education, QI team member etc.)
  - The person responsible for improvement in the organisation (executive or similar)
  - The people who deliver the content.

## Training Resource Pack

- This is for those who will deliver any taught part of the programme, or who will mentor a delegate on the programme. It includes the Trainer Guide (this document), which outlines 'how-to' teach the content at a granular level, and additional resources, including templates for virtual delivery, videos and supporting materials.

## Applicant Guide

- This guide introduces the programme for people who are interested in joining it. It explains the benefits to individuals and their service.

# Evaluation

## Evaluation Guide

- Uses a four-level (Kirkpatrick) approach to evaluation. It includes pointers on how to assess learning and benefits of delivering the programme.

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These resources can be accessed and downloaded at:  
<http://q.health.org.uk/resource/quality-coach-development-programme/>

## STEP 2

# 2 Identify your Programme Sponsor and Discuss the Feasibility of Running the Programme

### By the end of Step 2, you will:

- Know how to identify your Programme Sponsor and what to discuss with them and other stakeholders.

It is recommended that you have the full support of the Executive Team (or equivalent) within your organisation(s) to train and develop Quality Coaches. Executive and senior support is fundamental to the success of this role and the programme. Ideally a Sponsor is the Executive (or equivalent) responsible for improvement or quality in your organisation(s). This could be a Director of Improvement, or Medical Director, for example. At times an Executive may not always be the most suitable candidate for the Sponsor of your programme. You should decide who is best suited to take on this role and the responsibilities that come with it.

You should ask the Sponsor to read the Executive Summary in advance of meeting to discuss the feasibility of the programme. This will give them an understanding of the scope of the programme, and their role in supporting the establishment of Quality Coaches in your organisation(s). They will also be able to consider whether it is the appropriate time to go ahead with the programme.

As Programme Leader, when you have read both Part A and Part B, discuss with the Sponsor whether this fits with your organisation's strategy and QI direction. You should also ask their opinion on the programme's feasibility within the organisational readiness. We suggest you discuss these points with both your education department and senior operations leads to gauge their opinion.

### STEP 3

# 3 Agree the Scope and Outcomes of the Programme

#### By the end of Step 3, you will:

- Know how to set the scope, aims and outcomes of the programme
- Understand how to adapt the content for your organisation
- Be aware of the different teaching approaches and what factors to consider.

As a Programme Leader you should set the scope, aims and objectives of this programme. These should be relevant to your organisational context. You may wish to discuss these with your Sponsor and/or QI Lead to get high-level support.

We have set some suggested programme aims and learning outcomes, which you may wish to use or build upon in your role as Programme Leader. These should be discussed and agreed with your Sponsor.

## *Aim of the programme*

Support individuals to develop the skills and knowledge required to independently and confidently coach a team through improvement work

## *Learning outcomes*

By the end of the programme delegates will be able to independently:

- 1 Coach an improvement team ensuring robust application of QI methods and principles
- 2 Understand the concepts of coaching improvement and the difference between coaching and advising
- 3 Explain their role as a Quality Coach to different stakeholders
- 4 Promote an environment that encourages team members to contribute equally to the development of improvement work
- 5 Assimilate QI knowledge and facilitation skills that support teams to progress through the different stages of QI work
- 6 Help teams to understand barriers and enablers relating to their QI work, in support of the sustainability of interventions

- 7 Advocate for meaningful involvement in QI work and advise teams on methods for involvement
- 8 Coach a team to identify, collect and interpret data in support of their improvement work
- 9 Apply creative problem-solving methods and behaviour change concepts to support teams to revive a stalled effort
- 10 Critically analyse their own limitations and the limitations of coaching.

There are also recommended learning outcomes for each session of the programme. You should review these (in the slide sets and Trainer Guide) to ensure they are suitable. Adaptation or tailoring of content should be reflected, if necessary, in changes in learning outcomes – see below on adaptation and tailoring of content.

Note that the evaluation on student learning, such as the self-assessment (see Evaluation Guide), is based on the learning outcomes of the programme. You may need to alter the assessment tools if you change the programme outcomes.

## *Adapting the content for your organisation*

The programme has been designed to support tailoring and adapting to many different settings. This includes all of the teaching resources, notes, guides and supplementary materials (case studies, activities etc). Nonetheless **please be aware that there are certain modules that we consider essential to the role of the coach**. Without the core content delegates will struggle to achieve the learning outcomes and the organisation may fail to realise the benefits of the programme. **If/when this programme is accredited there will need to be evidence that core content was taught.**

If you choose to adapt the programme there are three forms of adaptation you can select, ranging from 'minimal adaptation' to 'significant adaptation'/core content only. These are described below:

### **Minimal adaptation**

This means you are making only *minor changes* to the programme, which would allow for potential accreditation in the future (see Accreditation  section.) This may include:

- Re-ordering the programme structure
- Changing or removing a small number of activities
- Amending slides, slide notes or other teaching aids whilst keeping the bulk of the content very similar to the original.

### **Moderate adaptation**

- This involves the removal of some supplementary content from the programme. In the design of the programme, we have differentiated between core content and supplementary content to support you with this. It may also include changes to materials, as outlined in 'minimal adaptation' above.
- Common reasons for the removal of some of the supplementary content may be due to duplication of teaching from existing internal programmes, lack of expertise to deliver this content internally, urgency to deliver the programme or lack of time. We would recommend you consider providing this resource as 'Continued Professional Development' (CPD) for coaches upon completion of the reduced programme.

## Significant adaptation

This involves the removal of *all* supplementary content from the programme and may also include adaptation to the core content, as outlined in 'minimal adaptation'.

## Tailoring content

Tailoring content is different from adaptation of content. Instead of removing content there is a substitution of some of the provided materials and examples with your own content, to support enhanced learning at a local level. (This is highly encouraged.)

## The alternative 'Lean' approach

Only minor adaptations are needed to 'reframe' this programme for a Lean approach. The Model for Improvement has been used as the selected methodology for this programme, and is discussed at various stages throughout. You would just need to substitute these slides for your own materials – fortunately this is only a small section of the programme.

You may also wish to review the prerequisites for the programme (discussed below) as these are aligned to training using the Model for Improvement.

## The team/service or system level teaching approach

As one of the objectives of a Quality Coach is to provide QI support at a team or service level, we suggest this programme be taught on an organisational or system level. This is dependent on the size, scale and nature of your organisation.

The main factor with regards to teaching at a team/service level is whether you would get sufficient return on investment. Consider this in terms of both time and finances. You should take into account the planning, delivery, review and iteration of the programme, plus the number of faculty teaching and delegate study days required.

When adopting a system level of teaching, the main factors to consider are:

- The QI maturity of the organisation/s
- The practicalities of teaching – the 'who, what, where and when' and how they work for all parties
- The agreed expectations of the different parties in the planning, delivery, review and iteration of the programme
- The Chatham House rules of confidentiality,<sup>16</sup> especially within the coaching circles, and personal/coaching stories that are divulged
- You may want to formalise it with a Service Level Agreement between the different QI services, to reduce any potential of ambiguity and conflicting agendas.

## 4

### STEP 4

# Identify and Recruit Faculty Experts

#### By the end of Step 4, you will:

- Understand the role of the faculty
- Know what skills are needed to support delivery of the programme.

## Faculty Experts

The programme brings together different specialist areas related to improvement coaching into one unified programme. Subject matter areas covered include quality improvement, GROW coaching, facilitation skills, measurement, the human side of change and patient involvement. Few people will have the deep understanding of all subject areas that is needed to be able to deliver the entirety of the programme content. Therefore we recommend that you identify a 'Faculty Expert' for the different subjects covered in the programme. A faculty matrix table is provided to support you with this.

The faculty's role is to oversee the tailoring (and adaptation if required) and delivery of the content relevant to their area. A wider faculty may need to be recruited to support the delivery of the programme, depending on the size of the cohort. You may wish to use this programme as an informal mechanism for QI faculty development. For instance, you may wish to use the Faculty Expert alongside a non-subject matter expert to plan and deliver individual session content. This has the benefit of the internal faculty development as described above, as well as complementing the delivery by providing a different perspective. It also allows you to sustain the programme for future iterations by growing your faculty's capability.

Regardless of the level of QI knowledge, all faculty members need to be confident and have experience in educating, facilitating and presenting challenging content in a manner that is accessible to delegates of varying capability. Their QI experience and knowledge can focus on sections that they are either confident in, or want to develop further in. All of the slide sets and materials have been written with comprehensive notes and suggestions to help with delivery, even for a less experienced QI or change professional.

If you are unable to get different members into the faculty, we advise appointing people throughout your organisation to act as 'points of contact'. These people could address faculty or delegates' issues or questions that arise during the programme. An example could be having a data analyst within the organisation who you could ask for help in certain complex data situations.

You should delegate module or session content to the faculty, encouraging them to tailor it to suit their delivery style and your organisation. Throughout the planning and delivery of the programme, we recommend maintaining a frequent catch up with the faculty – perhaps one hour, once a week. This will afford you time to discuss adjustments, answer questions, strategise and address challenges.

## Mentors and Buddies

Delegates on the programme should be assigned a mentor who they will meet with at various stages throughout the programme. This is typically an experienced improvement coach and may be a member of the faculty. The mentor's role is to coach and mentor the delegate, and may support the review of self-directed tasks. In the handbook there is a page for delegates to set personal objectives as part of this programme. The mentor should discuss these with the delegate and reference them in all of their 1:1 conversations. Additionally as the new Quality Coach starts to coach real teams whilst on the programme, they can use the mentor as a critical friend to reflectively discuss the application of the

programme to real coaching situations. As Programme Leader you may wish to adopt the Assessment Framework (see Evaluation Guide) to provide assurance on the calibre of coaching in situ. One part of this framework includes the use of a reflective log for coaches to complete. The mentor would support the completion and review of this log with the coach at frequent intervals.

We would also encourage you to allocate each delegate a buddy on the programme. This person would act as an immediate support throughout the programme and the work they will be coaching. Time with buddies would be informal.

## QI Link

Quality Coaches *must* coach improvement work as part of the programme. Typically this coaching begins around two months after the programme begins. As a suggestion, you could run an intermediate QI course (e.g. [NHS Improvement's \(2019\) QSIR programme<sup>17</sup>](#) or similar) in tandem with the Quality Coach Development Programme. This allows simple identification of 'new' improvement work that a delegate could be assigned to as coach.

To support this (or if you are not running an intermediate programme), you will need to have at least one individual in the QI faculty acting as the link between the Quality Coach Development Programme and identifying improvement work for each delegate of the programme to coach.



<sup>17</sup> NHS Improvement (2019). Providing participants with the know-how to design and implement more efficient and productive services. <https://www.england.nhs.uk/wp-content/uploads/2021/09/Quality-service-improvement-and-redesign-programmes-providing-participants-with-the-know-how-to-design-and-imp.pdf>

# Faculty Expert Matrix

We have designed the table below to allow you, as Programme Leader, to decipher the skill set of your teaching faculty, as this covers the generalised content of the course. We suggest that you identify at least one person for each main section to act as an expert in that field, and encourage you to utilise their skills during the planning, facilitation and review phases.

Subject area	Notes	Expert
<b>Quality improvement</b>		
Coaching improvement	Considerable experience (ideally >3 years) coaching teams to deliver QI work. Based on the <u>Model for Improvement</u> .	[Your faculty expert here]
Improvement vs other types of change	QI and its relationships to audit, service evaluation, research, clinical transformation etc.	
Involving patients in improvement	Should have experience working in partnership with patients in relation to QI.	
Creative thinking	Using creative tools for problem solving and enabling divergence and convergence of ideas.	
QI mentorship and education	Ideally you should have a QI lead or expert involved who has delivered training at a higher level in the past.	
<b>Data</b>		
Coaching measurement	Supporting teams to identify their <u>family of measures</u> and develop a measurement plan based on the seven steps of measurement.	
Informatics	Qualitative data, quantitative data, Patient Advice and Liaison Service (PALS), patient data.	
Using Excel (or similar)	Charts, tables, formulas.	
Data presentation	For example, run charts.	
<b>Education and online facilitation</b>		
Online facilitation skills (if delivering virtually)	If delivering the programme virtually you will need expertise on teaching online (for example using Teams/Zoom) and using breakout rooms, polls etc. You will also need to facilitate activities virtually using platforms such as Mural/Jamboard.	
Liberating Structures	Experienced practitioner of several key <u>Liberating Structures</u> . These are used in the programme (1-2-4-all, TRIZ, What3 debrief, Drawing together). There is flexibility to add many more, as needed.	
<b>Organisational development and Human Factors</b>		
Coaching	<b>GROW coaching</b> (or other structured method), active listening and contracting with a team.	
Context, culture and Human Factors	Collecting insights into local context using a framework such as Batalden/Splaine. See <i>Context for successful quality improvement</i> by the <u>Health Foundation</u> (2015). <sup>18</sup>	
Behaviour change	Experience gaining insights into behaviour change using a framework such as COM-B and the <u>behaviour change wheel</u> .	
Working styles	Helping individuals and teams explore different working styles (aka people styles or personality styles) based on the work of Bolton & Bolton and Merrill-Reid.	
Group dynamics and working with groups	Organisational development expertise and experience in support of fostering better group working and collaboration towards service delivery.	

18 The Health Foundation (2015). *Context for successful quality improvement*. [www.health.org.uk/publications/context-for-successful-quality-improvement](http://www.health.org.uk/publications/context-for-successful-quality-improvement)

## STEP 5

# 5

# Organise the Logistics of the Programme

### By the end of Step 5, you will:

- Know what to expect for planning, delivery and evaluation of the programme
- Be aware of strategies for supporting delegates
- Understand how delegates should be assessed at the end of the programme.

At this stage, you should consider the practicalities of running the programme. This includes scheduling, the timelines of the programme, setting up the mechanisms for supporting delegates of the programme and assessment.

## Timelines

The time it takes to plan, deliver and evaluate the programme depends greatly on:

- the urgency of the need for coaches within your organisation
- the amount of adaptation and tailoring of content you wish to undertake
- the intensity of delivery.

Many organisations opt to deliver this programme once a year (planning for three months, delivery for six months, evaluation for three months). That being said, it is entirely possible to run this programme twice within a 12-month period, with good planning and sufficient faculty support. We provide some suggestions for what to anticipate and expect for the three key phases of the programme; planning/set-up, delivery and evaluation.

## Planning and set-up

In this stage you should initially focus on building support and interest in the programme at all levels of your organisation/system. Generally, you should start at the top – with your Executive Team (or equivalent) and the recruitment of a Programme Sponsor. In partnership with the Sponsor and a QI Lead (this may be you) you can agree the scope, aims and objectives of the programme. Example aims and learning outcomes are included in Step 3 [\(see Step 3\)](#). The timeline for this can range from a week to a few months, dependent on urgency.

Once the faculty has been recruited (Step 4 [\(see Step 4\)](#)), you will need to work closely with them and should delegate responsibility for tailoring and delivering the content to suit your organisation. Adaptation can be very time-consuming, and we strongly encourage you to seek guidance and support from your Sponsor when doing this. We recommend a lead time of around two months to enable the faculty to familiarise themselves with the programme, the content they will deliver and make a plan for delivery. If you choose to implement ‘significant adaptation’ (see adaptation information in Step 3 [\(see Step 3\)](#)) to the content and programme, you should extend this time period to at least three months.

## Delivery

The content provided without adaptation is designed to be delivered over **eight full-day sessions**, as outlined in the programme structure. It is recommended that this programme is taught over a period of six months, in order to allow coaches and the

work they are supporting the time needed to develop. It is also important to note, consider and evaluate the time commitment that is needed from the faculty, mentors and coaches for this programme.

## Evaluation

We have created an evaluation framework based on the Kirkpatrick model, which we encourage you to use in its entirety. The evaluation phase starts at delivery (with pre-programme delegate assessment) and

continues beyond the completion of the taught delivery (approximately three to six months) with an evaluation on the impact of coaches on teams.

# Delegate support throughout the programme

The Programme Leader and faculty can use a variety of strategies to support coaches during the programme. We advise that as part of this you assign mentors to each delegate and ideally a buddy (see Step 4 [4](#)).

The content has been designed to support an 'active' approach to teaching – meaning there will be a lot of opportunities in the classroom to discuss and apply coaching/improvement theory and concepts. To further enhance this, we suggest that you use the 'coaching circle' model as a mechanism to enable coaches to provide peer support, share learning, answer questions and discuss progress.

## Coaching circles

- These involve a small group (around five to seven) of coaches, who meet at key stages of the programme. It is a peer-to-peer coaching model, where all in the group take turns being a coach and coachee. We recommend that you run coaching circles from session two of the programme until the end. At the beginning of the programme, you may wish to encourage the delegates to consider or draw on non-quality improvement or coaching challenges so they get accustomed with the process of a coaching circle.

### Principles of a coaching circle

- The subject for discussion should be a real coaching challenge that is current and concrete
- The 'coachee' should be highly involved in the topic of interest (it shouldn't be something that they are only marginally involved in)
- There is no hierarchy in the room – coaches are all peers
- There needs to be trust and positive energy among the peer group
- Discussions should remain confidential and should not be discussed outside of the meeting without express permission from each member of the coaching circle
- Quality Coach peers shouldn't give advice; they should listen and coach the 'coachee'
- Coaching circles should be seen as a confidential space to discuss successes and challenges around coaching the team, as well as an opportunity to discuss taught content.

# *Delegate assessment during and on completion of the programme*

We have created a simple assessment framework, which you are welcome to adopt for your programme (see Evaluation Guide). Upon accreditation of the programme the authors will introduce a formal assessment framework to support all adopters of the programme to consistently and fairly assess delegates.

It is advised that you use assessment of some form to provide assurance on the quality of coaching (students) provided as well as on the quality of delivery (teachers). Three main forms of assessment can be used:

## **Diagnostic assessment**

- **Initial vetting**  
The Programme Leader or a nominated designee should vet all applications to the programme to ensure they meet any prerequisites as outlined in Step 6 [6](#).
- **Mentor conversations**  
Mentors should use all meetings with their mentees as an opportunity for development and learning. See Evaluation Guide.

## **Formative assessment**

- Opportunities in classroom discussion, questions
- Self-directed activity completion
- Teachback sessions
- Reflective activities built into programme (e.g. stinky fish, random image reflection) as well as those discussed in mentor conversations
- Mentor meetings.

## **Summative assessment**

- Abstract submission
- Learning Log Book submission
- Poster presentation and reflection (20 mins plus 10 mins Q&A)

Further information and detail about these can be found in the Evaluation Guide.

# *Virtual delivery considerations*

The content has been created to support both face-to-face and virtual delivery. If you are delivering this virtually, then you should aim to use an active approach to teaching; this means avoiding long presentations, and ensuring delivery is engaging, with delegates remaining present when in breakout rooms.

You may wish to use a 'blended' approach to deliver this programme. This means using a blend of face-to-face interaction, online learning and asynchronous working.

If you are delivering the programme virtually, you will need to consider which online

collaboration tools you will use to facilitate the active parts of the programme. For instance, if you are running an activity reviewing a case study, how will delegates review the document, where will they record notes, how will you split the larger group into smaller groups, etc?

All of the content for the programme has been produced without the need to purchase or sign-up for additional software or licences as a standard. This means you can continue to use existing software/tech solutions that your organisation already has in place, without spending money on additional software.

## STEP 6

# Recruit Delegates and the Wider Faculty

### By the end of Step 6, you will:

- Know how to approach recruitment of delegates and faculty to the programme
- Understand the required experience and knowledge for applicants
- Be aware of other considerations regarding recruitment.

Once you have followed steps 1–5, you can advertise and recruit delegates on the programme. We recommend allowing one to two months for this stage at the very least.

A robust recruitment process should be put in place to ensure suitable candidates join this programme. We advise a cohort size of between five and thirty for the best experience for both delegates and faculty. All delegates should complete the pre-programme self-assessment at this stage to support the evaluation of the programme.

We advise that you set a prerequisite for applicants to the programme. To excel in their roles, coaches should have experience of QI work that they can refer back to and reflect as part of the programme. They should have received training in the key concepts of QI in recent years on top of their practical QI experience. Our suggested prerequisites are outlined below.

### Essential

- Training in the Model for Improvement, including the development of SMART aims, selection of outcome, process and balancing measures, and selecting changes and testing changes using PDSA
- Application of the Model for Improvement as part of QI work. Ideally this work will have been presented in recent years, for constructive feedback to aid their learning in QI
- Ability to create a driver diagram for a simple QI project
- Demonstrable enthusiasm for and commitment to QI.

### Desirable

- Understanding of the simple concepts of measuring for improvement, including how to use run charts
- Understanding of the simple concepts to facilitate analysis and problem solving, such as process maps, fishbone diagrams or similar.

## Further considerations

- Applicants to the programme should have senior support to join the programme and perform their new duties as a Quality Coach. This may be reflected in changes to their job plan by receiving ring-fenced time to coach QI work locally. Contextual factors such as demand on the service should be considered when reviewing applications
- It is recommended to develop staff who are recruited in substantive posts, to ensure sustainable outcomes and coaching support in services. Their role, including banding and work pattern, are not relevant and should be not a factor in the success of their application to the programme
- Delegates can be from across the organisation, hence do not have to be a patient-facing or front-line clinician to be eligible. You may wish to consider the distribution of potential (and previous) delegates in order to be as efficient with resources as possible.

If an applicant does not meet this criteria, you may wish to encourage them to undertake local or external QI training, and/or to join an improvement team, prior to starting this programme.

Delegates of the programme should be afforded time to undertake the Pre-programme module (self-directed) before the programme begins. Time should also be given for delegates to complete any pre-programme assessments, and to meet their mentor.

## STEP 7

# 7 Deliver the Taught Content

### By the end of Step 7, you will:

- Understand the three steps involved in delivering the programme: tailoring, teaching and reflecting/adapting.

There are three general steps in delivering the content of this programme:

#### **1 Tailor the content (where needed) and familiarise the faculty in preparation for delivery.**

- Assuming that any decision on adaptation has already taken place, the faculty should plan and tailor the taught content (slide sets, examples, activities, case studies, pace, depth of content) to the local context and delegate sections to teach based on knowledge and confidence. This should happen prior to every taught session. It can be done months, weeks or days in advance depending on your local working styles.

#### **3 Debrief, reflect and adapt more**

- The faculty should re-group (ideally as soon as possible after every session) to reflect on how the programme is going and how well each individual session has gone
- Use the Evaluation Guide, including delegate feedback, to provide a learning opportunity for faculty members to develop
- Based on your findings you should iterate and tailor further.

#### **2 Teach the content**

- Use a flexible approach to deliver the programme based on the delegates' learning needs and abilities. This may involve changing the order of content, adding or removing supplementary content based on learner needs or adjusting the pace, for example
- During this the mentors should be available for regular meetings with the delegates to critically reflect on the programme and their coaching experience, and assist in self-directed learning tasks.
- Alongside this, the QI Lead (or other link to QI work) should assign coaches to QI work, or ensure that coaches have sought work themselves to coach by around session 3 of the programme. The QI Lead and mentors should continue to oversee the QI work to ensure coaches are engaged and proactive in their work.

## 8

### STEP 8

# Reflect On and Review the Programme and Consider Next Steps

#### By the end of Step 8, you will:

- Know how to evaluate the programme
- Understand what to consider in terms of next steps.

Use the Evaluation Guide to guide the robust evaluation of your programme. You should also focus on the return on investment for your organisation to re-evaluate the contextual feasibility and value of the programme.

It is advisable to collate all the delegate feedback responses from throughout the programme to assess if certain areas/days need particular adaptation or tailoring to meet the needs of future delegates. Alongside this, it may be helpful to bring together the mentors and faculty for their feedback and opinions on the particular sessions and programme as a whole.

From all this feedback it is worth revisiting the initial aims, scope and objectives of the programme with your Sponsor to be able to discuss:

- Did you achieve the aim?
- Is there a process of reviewing the effectiveness 6, 12 or 18 months on for the QI team and the organisation as a whole?
- Is it possible to do the programme again, with or without iterations?
- Do you need to recruit anyone into the faculty?
- Where in these eight steps do you need to start?
- What ongoing support mechanisms are you going to employ for the graduating delegates?

There are no right or wrong answers in this, and it is the responsibility of you, your Sponsor and the faculty to work out what to do next.



# Glossary

## **Adapt**

Changing the content with regards to modules/core/supplementary content.

## **Behaviour change wheel**

A model that demonstrates factors that affect behaviour and different types of intervention that can be used to change behaviours.

## **Buddy**

A person who is on the course who will act as peer support for someone else on the course.

## **Change idea**

An idea that a team may want to test out as part of their improvement work. Teams may have many change ideas and may only test two or three, for example.

## **Coaching circle**

A tool used throughout the programme where the peers can practise coaching in a safe space in order to explore challenges and solutions, either related to their coaching experiences, or not.

## **Contracting**

Creating an agreement between coach and improvement team to establish boundaries and ways of working together.

## **Core content**

The essential knowledge that every coach needs in order to succeed in their role.

## **Coachee**

Person who is being coached.

## **Dosing approach**

Building capacity and capability using training programme, appreciating that not everyone in the organisation will need the same level of knowledge about QI so deploying that knowledge accordingly.

## **Faculty**

Group of experts and non-experts delegated to teach or run the Quality Coach Development Programme.

## **Family of measures**

The different types of measures used to evaluate QI work including outcome, process and balancing measures.

## **Fishbone diagram**

A tool used to understand root cause of a problem by breaking it down into different causes which may be affecting it.

## **GROW coaching**

GROW (Goals, Reality, Options, Will), a well-known coaching model which supports coachees to make realistic and achievable goals.

## **Kirkpatrick model**

AKA four levels of training evaluation – a way to evaluate the results of a training programme, widely recognised.

## **Lean approach**

Process improvement approach which uses the concept of continuous improvement to systematically improve efficiency on an incremental basis.

## **Liberating Structures**

Liberating Structures are a selection of 33 tools which can be employed for facilitating meetings and conversations, by removing hierarchy and enhancing trust and promoting participation within a group.

## **Macrosystem**

A system at a multi-service, divisional, hospital or trust-wide level.

## **Mentor**

Someone who is an experienced improvement coach and will provide you with support and advice throughout the course and beyond.

## **Microsystem**

A system at an individual-, team-, or service-level.

## **Model for Improvement**

A simple tool which underpins QI work, it is widely used comprised of 3 key questions supported by a testing cycle (PDSA cycle, see below). This allows people to think about an aim, data and ideas for change.

## **PDSA**

‘Plan, Do, Study Act’, a framework that can be used to test different change ideas and learn what works and why.

## **Process map**

A visual map which shows how something works from start to end; can be a step-by-step guide or more high level. This can be used to help identify problems where process improvements can be made.

## **QI team**

Members employed within a centralised QI or improvement department.

## **Run chart**

A chart showing data over time with a median line marked.

## **SMART aims**

Goals for work which are Specific, Measurable, Achievable, Realistic, Time-bound.

## **SPC charts**

Statistical process control charts are line graphs showing data over time. They show the mean of a dataset plus calculate upper and lower control limits allowing performance monitoring.

## **Stinky fish**

A metaphor for the things that you carry around but don’t talk about. The longer you hide it, the stinkier it gets.

## **Supplementary content**

Additional content that is not essential to be a coach; however, is advised to ensure quality of coaching.

## **Tailor**

Modifying the content, e.g. changing examples to fit your organisation.

For additional information contact  
clcht.continuous.improvement@nhs.net or the Q Community

The *Programme Leader Guide* is part of the wider Quality Coach  
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