Quality Coach

Trainer Guide

Quality Coach Development Programme

Quality Coach

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

The *Trainer Guide* is part of the wider Quality Coach Development Programme © resource bundle. For more information visit:
https://q.health.org.uk/resource/quality-coach-development-programme/

Authors

Sidney Beech
Jennifer Cotter

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Part 1

Introduction

Welcome to your Trainer Guide for the Quality Coach Development Programme.

This guide has been created for the programme faculty, in support of the delivery of the programme inside and outside of the classroom.

After reading this guide, you should also read the Programme Leader Guide for more detail on the programme, including how to run it.

Why do we need this programme?

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).[1]

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, is 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 these issues can use their invaluable insights, experience, and expertise to improve services.

The ambition of everyone improving all the time is laudable. 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, or from individuals with QI training (QI Leads, Fellows or similar). 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 (or similar) in order to support bottom-up improvement work; instead new approaches need to be sought.

1 The Health Foundation (2021). Quality improvement made simple. What everyone should know about health care quality improvement. Third Edition. https://www.health.org.uk/sites/default/files/QualityImprovementMadeSimple.pdf

Quality Coaching

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;[2] Lloyd, R. 2018).[3] 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 as part of their job plans 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 (or similar). More advanced and specialist support and general training is then the main provision of full-time QI professionals – either through a central team or through formal QI roles (e.g. QI Leads, Fellows etc).

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[4] 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.

2 NHS Improvement (2017). Building capacity and capability for improvement: embedding quality improvement skills in NHS providers. https://qi.elft.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/

Aim and Learning Outcomes for the Programme

Aim:

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.

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.

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

Structure of the Quality Coach Development Programme

Without any significant adaptation to the programme, the content can be delivered over eight full days, in addition to a short introductory session and self-directed e-learning. The facilitator guides for each session are outlined in the remainder of this document.

All slides have comprehensive slide notes that should help you to prepare for and deliver the session. 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 would suggest that you review the slides alongside this guide and make changes to support you with delivering the content based on your own style and experience. We suggest each organisation tailors the slides and materials to their own local context. This may include adding in local examples and sharing your own experiences.

The materials for the programme have been created for both face-to-face (F2F) and virtual delivery. Either mode of delivery will require additional planning.

We have created templates for virtual delivery that you are welcome to use, adapt and edit to suit your needs. You may wish to use these as a foundation in the prep for F2F delivery.

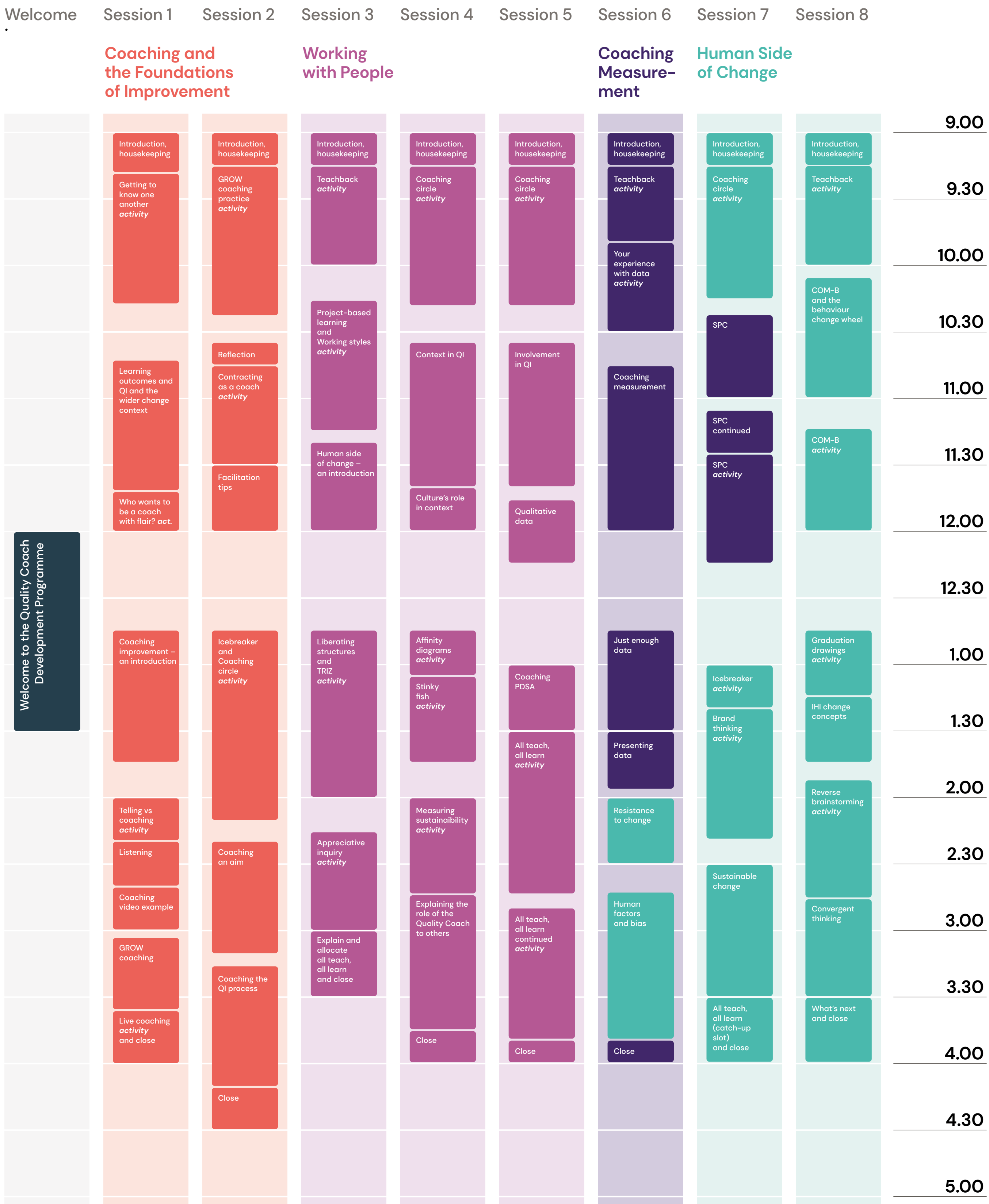
QCDP structure

Module	Session	Session detail
Pre-programme	–	Understanding self, reflective practice and a refresher of quality improvement.
	–	How the programme will work and setting expectations from the start.
Coaching and the Foundations of QI	1	• How QI relates to other change approaches, such as audit, research, transformation etc. • The fundamental skills and knowledge every coach needs such as GROW coaching, coaching an aim and the common challenges in coaching QI.
	2	• How to contract as a coach and a first go at coaching.
Working with People	3	• How to foster good relationships within teams. • How Liberating Structures can support good and fair participation in group discussion.
	4	• Context, culture, and sustainability, and how contextual factors can make or break QI work.
	5	• Strategies to advocate for better inclusion and engagement of patients. Coaches are also given the chance to individually teach a technical concept.
Coaching Measurement	6	• How to use data to support teams, breaking down measurement into easy, practical methods. • How to use Statistical Process Control (SPC) charts, a common feature of many providers' reports, as well as improvement work.
Human Side of Change	7	• How to apply an evidence-based model to support behaviour change, and how to use a simple model for framing resistance to change.
	8	• How to use change concepts and creative thinking to promote new ideas to tackle a problem. • Next steps as a coach. • Preparation for the final assessment (where applicable).

Please note: Sessions 7 and 8 are accredited as **supplementary** content. 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. Please see the Programme Leader Guide for more information on 'core' and 'supplementary' content.

The schedule in more detail

The programme is delivered over eight sessions without any major modification or changes to the content or structure. Each session will take one day to deliver. A summary of the taught content is shown below. This is a guide, as you will need to make amendments to suit your organisation. *Note: you may wish to swap the second half of session 6 with the first half of session 7.*



Adaptation of the programme

If you decide to make any considerable changes to the programme (re-organise structure of the programme, add/remove content, make major revision to the content) then you should review and update the facilitator guides and schedule for each session.

The authors of the programme have indicated what we believe should be core content (i.e. not removed) and what could be supplementary. Of course, the more content, the better equipped your coaches will be. This will be a judgement call by you and the faculty to determine best return on investments, such as time.

The first six sessions of the programme are deemed 'core content' with sessions 7 and 8 as 'supplementary'.

Supporting delegates throughout the programme

Delegates are supported by you and the faculty throughout the duration of this programme. The programme has been designed to encourage an 'active' approach to teaching – providing delegates with opportunities in the classroom to discuss and apply coaching/improvement theory and concepts. Outside of the classroom, delegates are supported by mentors and buddies – as outlined below. Inside the classroom we have created space for different, engaging activities to help delegates grow as coaches – including coaching circles, teachback and All Teach, All Learn. See more details on these approaches below.

Mentors

Each delegate should be assigned a **mentor** who will meet with them at various stages throughout the programme. The mentor's role is to coach and mentor delegates as a new Quality Coach. Mentors should be experienced improvement coaches themselves. As part of the mentoring approach, delegates should meet with them to set personal objectives. Objectives should be discussed in initial conversations between delegates and mentors, and referenced in all subsequent conversations. As a member of the faculty it is likely that you will be a mentor.

Buddies

All delegates should have a **buddy** on the programme. The buddy's role is to act as immediate support as the programme progresses. Time spent together as buddies is informal. Often buddies are assigned by the Programme Leader.

Coaching circles

Coaching circles involve a small group 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. The benefit is that delegates are all going through the same programme, and have more than one person to support and be supported by (vs. conventional 1:1 coaching). There are four coaching circles in the programme, depending on its duration. An outline of the structure, principles, set up and order of running a coaching circle is shown below.

Suggested structure

- Purpose: to seek the expertise, guidance and support of Quality Coach peers, to respond to ongoing improvement coaching challenges
- Principles:
  - 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 – you 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'.
- Set up:
  - Around five people, attending either in person or via video conference (e.g. MS Teams)
  - 60+ mins required.

STEP 1 2 minutes

Select the 'coachee' and time-keeper

- The 'coachee' should be someone with a concrete and current coaching challenge that they would like support with
- The time-keeper's role is to help ensure the meeting stays on track.

STEP 2 10–15 minutes

Intention statement by 'coachee'.

Clarify these questions:

- Current situation: What key challenge or question are you up against?
- Stakeholders: How might others view this situation?
- What future are you trying to create?
- Threshold: What do you need to let go of – and what do you need to learn?
- Help: Where do you need input or help?

Coaches listen deeply and may ask clarifying questions (don't give advice!)

STEP 3 10–15 minutes

Short silence (stillness)

- Coaches should reflect on what they have just heard from the 'coachee'.
- What feelings, images, gestures and metaphors come to you, based on what you have just heard?

STEP 4 10 minutes

Mirroring

- Each coach shares the images/ metaphors, feelings and gestures that came up in the silence or while listening to the case story
- Having listened to all coaches, the 'coachee' reflects back on what they heard.

STEP 5 20 minutes

Generative dialogue

- Reflect together on the remarks of the 'coachee', and move into a generative dialogue on how these observations can offer new perspectives on the case.
- Go with the flow of the dialogue. Build on each other's ideas. Stay in service of the 'coachee' without pressure to fix or resolve their challenge.

STEP 6 8 minutes

Closing remarks

- By coaches
- By 'coachee': How do I now see my situation and way forward?
- Acknowledgment: An expression of genuine appreciation to each other.

STEP 7 2 minutes

Individual reflection

Just-in-Time training (used for 'teachback' in the programme)

Just-in-Time training is a simple teaching strategy that provides short, purposeful training to individuals or teams at the exact moment that they need it. For example, a Quality Coach may be working with a team who are analysing a complex issue or problem that they do not yet fully understand. Using Just-in-Time training, the Quality Coach may teach the team in that moment about root cause analysis tools such as the fishbone diagram. The Quality Coach and the team can then use the tool to explore the complex issue or problem more effectively and efficiently.

To support coaches to prepare for this form of learning, they will take part in several teachback activities throughout the duration of the programme. The teachback activity involves delegates working with a small number of their peers to develop a teaching resource on a given QI topic at short notice, without the opportunity to prepare beforehand. Example topics include driver diagrams, setting a SMART aim, run charts, family of measures, fishbone diagrams, stakeholder mapping and many more. Each group will have a short period of time (e.g. ten minutes) to rapidly create a Just-in-Time training resource (using slides, visuals or similar). Each group then tests their resource out with the wider group of delegates by teaching the content immediately after creating it.

The benefits are an opportunity to practise Just-in-Time training, as well as being able to develop a pool of resources on QI tools. If delegates share resources then they will quickly have a library of educational resources on QI tools.

All Teach, All Learn

All Teach, All Learn is an activity that focuses on developing skills as an independent and self-directed learner and educator in QI. For this activity each delegate should prepare a 10–15 minute presentation on a QI tool that isn't taught as part of the programme, or in the teachback activities as mentioned above. Presentations are delivered by individuals and each delegate will normally have around four weeks to prepare for the session. The topics that each delegate teaches are either assigned by the faculty or selected from an extensive list of options.

The purpose of the activity is to provide an opportunity to expand knowledge of QI and to teach good practice in researching more about QI. Many improvers in healthcare are self-taught to some extent and so honing skills to absorb and learn new QI concepts and tools is vital. Importantly, this activity also provides a safe environment for delegates to practise teaching skills with useful feedback from the faculty.

In this activity delegates will also learn from their peers about different and exciting QI topics.

Expectations of the delegates

Learning

The best way to learn throughout this course is by 'doing'. In this programme, delegates will have many opportunities to put learning into practice both in and out of the classroom. There is an expectation that delegates attend and participate in all of the sessions. As adult learners they will be expected to take responsibility for their own learning, both academic and work related, and ultimately it is their role to check their progress towards completing all sections of the programme, including reading the handbook. There are suggested templates to support reflection in the handbook. Delegates are encouraged to use these throughout and beyond the programme.

Active blended learning will be used to deliver the taught content of the programme. Trainers will use activities, discussion and debates to facilitate learning in a meaningful way. 'Blended' means using different platforms and forums to provide learning opportunities – this could be in the form of a classroom activity, a coaching circle, or having an informal reflection session with the course mentor.

Coaching improvement work

Each delegate will coach at least one piece of QI work as part of the programme. Often this work is identified in collaboration with the Programme Leader and/or the faculty. Depending on your organisation, there may be a preference for how and when this is undertaken. Ideally work only begins as the Quality Coach Development Programme begins, and delegates should have no established professional relationships with individuals involved that may cause conflict of interest. (E.g. they are a line manager or direct report of a team member.) Coaching work outside of their department or area of expertise is a bonus – this means it's harder to give advice, take over the work or 'rescue' the team!

Teaching

There will be various sessions throughout the course including an All Teach, All Learn where delegates will be expected to research a topic and teach it back to their colleagues. There will also be teachback sessions using a Just-in-Time learning approach. These activities will help to develop strong teaching skills which will be needed when coaching teams through improvement.

Part 2

Facilitator Guides

Note: 'Human Side of Change' content is deemed 'supplementary'. Please see the Programme Leader Guide for more information on 'core' and 'supplementary' content.

The facilitator guides have been created to support you with the delivery of each session.

The guides are structured by each session, as well as the welcome session and pre-programme content.

Each section includes:

- Tasks for you and delegates to consider before and after each session
- Schedule and learning outcomes for the session
- Activity guides.

Tasks

You will need to do some work before the day of delivery. Often this involves tasks such as amending the content to suit your own delivery style, adding in your own examples and case studies and preparing for tasks and delivery. Similarly, delegates often have homework that they should complete before each session – it is often helpful to remind them of this in advance of the session.

Schedule

A detailed schedule provides timings for each session. These are indicative and so you should review the content and amend these accordingly.

Activity guides

These guides provide a detailed explanation on how to run each activity in this programme. Some of the activities in the programme will require the use of a template to support delegates in the breakout rooms. Guides contain suggested templates for the more in-depth and/or complex activities in the programme. Note that some activities simply require a conversation and therefore a template would not be appropriate.

When designing and testing this content, the pilot sites opted to use Mural as a space to run all of the activities virtually. This is a paid-for product with some limited capability as a free user. Your Programme Leader should identify which platform you will use and you can create templates based on the suggestions in the activity guides.

Pre-programme work

The pre-programme work should be completed by all delegates in advance of the first taught session of the programme. The purpose of the pre-programme is to ensure all delegates are starting on a good foundation in QI and that they understand the expectations of them and of the faculty.

Setting up the 'Understanding Self and Others' e-learning module

The content for the pre-programme work has been designed for self-directed learning. Alongside the material in the handbook, delegates should complete a short e-learning module, which is comprised of short videos and questions.

In support of this, we have outlined below some guidance on creating a simple e-learning module for use within your local setting. You can use the YouTube links and details provided below to help you with this. You may wish to seek guidance from your local Education and/or IT team if you have not created an e-learning course before. They may use your virtual learning environment (like Moodle, Canva, Blackboard etc.) to store and record completion of the e-learning. An HTML5 Package (.h5p) file is provided as a complete e-learning course should you wish to use it.

Example text to explain this module

Welcome to the Pre-programme module for the Quality Coach Development Programme!

The content is self-directed, which means you can cover the material at your own pace via [the VLE system]. In this module we will cover some introductory concepts that every coach needs to know.

We've broken the content down into short 'bitesize' videos, which can be found via the link below. Within this section there will be opportunities to pause and reflect. You should read the introduction section to the handbook, which covers this content in additional detail, as well as a refresher on QI.

We've also set some small tasks for you to do as part of this module. Have a look at those below and let the programme team know if you have any questions.

At the bottom of the page is a 'forum' for you to add any questions, thoughts, articles etc.

Enjoy!

Tasks to complete before the first taught session

- Meet with your mentor
- Set your objectives as part of the programme and agree these with your mentor
- Refresh your QI knowledge and identify areas for further learning
- Complete the 'understanding self and others' e-learning (link below) including reflection on the content (you can use the handbook for this).

E-learning example

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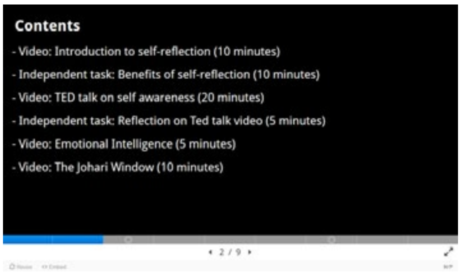

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Quiz question at 05:39 mins

Choose the correct statement:

- Reflection should be done alone as you will be best placed to know where you need to develop, improve and adapt in future situations.
- Reflection is best done both individually and as part of a team/group.
- Reflection is new to the NHS.

Quiz question at the end of video

Choose the correct statement:

- Self reflection is only something you do rarely as a coach.
- You MUST use Gibbs and Kolbs' learning cycles when reflecting as part of the Quality Coach Development Programme.
- Gibbs' learning cycle and Kolb's learning cycle are two simple and helpful models to support self-reflection.

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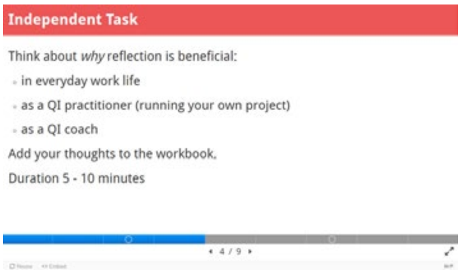

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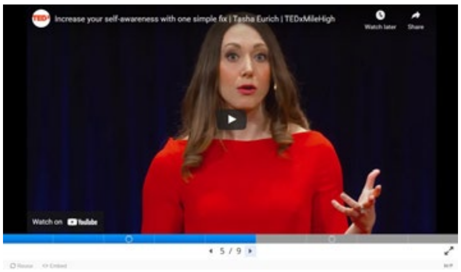

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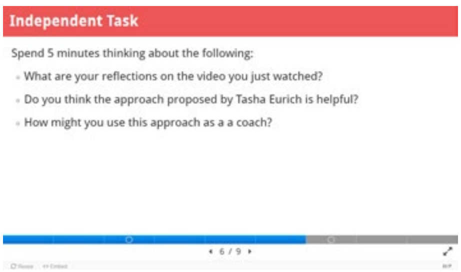

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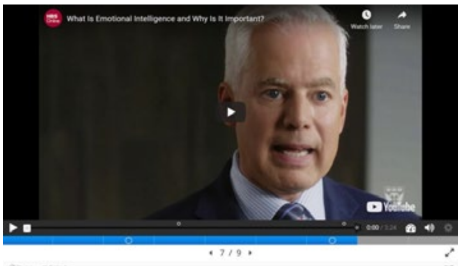

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Welcome Session

Tasks you should undertake before the session

- Ensure you and all of the delegates have completed pre-programme work, such as:
  - printing and/or emailing out the handbook to each delegate and faculty member
  - sending out the invites for the welcome session and taught sessions of the programme
  - allocating mentors and buddies to delegates, as appropriate
  - considering how delegates will coach QI work i.e. will you source QI work for them or are they expected to find it themselves?
  - ensuring delegates have completed the pre-programme evaluation (self-assessment) if applicable
  - ensuring delegates have set clear learning objectives for the programme with their mentors
- Review and tailor the slides to suit your organisation. Update the slide numbers in the table below
- Invite your faculty to this session and decide who will facilitate
- Prepare the polls, if you are using these.

Tasks you should undertake after the session

- Conduct a debrief with the faculty once delegates have responded (this can be done immediately after the session)
- Send out a reminder for the self-directed learning and pre-programme work and .CC in the mentors
- Share the slides with delegates (if applicable).

Welcome

Schedule

(A) indicates this topic has an in-classroom activity **(B) indicates this topic has a breakout room/small group activity**

Time	Topic	Activity	Slide numbers	Facilitator
9.00 → 9.20	Welcome: • Welcome and introduction to the programme • Housekeeping • Introduction to the facilitators • Quick poll **(A)** • Programme aims and learning outcomes • The handbook	Poll	1–12	Add who is delivering this section here
9.20 → 9.40	QI coaching • Why do we need QI coaches? • How you will learn		12–16	
9.40 → 10.00	Getting to know one another **(B)**	*In groups of 3, using breakout rooms or tables, ask delegates to share their experiences of QI so far. 15 mins to share (5 mins each)*	17	
10.00 → 10.15	The programme • How you will be supported • The structure of the programme • Assessment		18–22	
10.15 → 10.30	Next steps		23–24	

Coaching and the Foundations of QI

SESSION 1

Tasks you should undertake before the session

- Prepare the templates for the activities

  For virtual training we use Mural; however, this could be done on your platform of choice.

  For F2F training you may just need to use flipchart paper
- Review and tailor the slides to suit your organisation. Update the slide numbers in the table on the next page(s)
- Allocate a trainer to each section of the session
- Prepare the polls, if you are using these
- Read the activity guide and prepare the activities
- Read the BMJ article Quality Improvement into Practice[5] to help facilitate the conversation around change and QI
- Check that the handbook numbers indicated on the slides are correct (only applies if your Programme Leader has adapted or tailored the handbook)
- Share the slides with delegates beforehand (if applicable).

Tasks the delegates should complete before the session

- Meet with their mentor
- Set personal learning objectives as part of the programme and agree these with their mentor
- Refresh QI knowledge and identify areas for further learning
- Complete the 'Understanding self and others' e-learning, including reflection on the content
- Complete the pre-programme self-assessment tool (if applicable).

Tasks you should undertake after the session

- Send out the session evaluation form and conduct a debrief with the faculty once delegates have responded (this can be done immediately after the session)
- Send out a reminder for the self-directed learning from the session and .CC in the mentors
- Share the slides with delegates (if applicable)
- Share the link to the Mural (or whichever platform you use) so delegates can access the activity content afterwards (if virtual).

5 https://www.bmj.com/content/368/bmj.m865

Learning outcomes for session 1

- Understand the concepts of coaching improvement and the difference between coaching and advising
- Understand the role QI plays in the wider change context and begin to think about how you would determine whether a problem/opportunity merits a QI approach
- Be able to apply a simple coaching model to facilitate a coaching conversation
- Be able to use coaching questions.

Schedule

(A) indicates this topic has an in-classroom activity **(B) indicates this topic has a breakout room/small group activity**

More complex activities, particularly those in breakout rooms, have detailed explanation in the activity guide. The activity guide for session 1 is located below.

The timings for all sections with an activity include time for any teaching and/or explanations required, as well as the activity itself and any group reflection after completing the task.

Time	Topic	Activity	Slide numbers	Facilitator
9.00 → 9.20	Introduction to the day: • Housekeeping and agenda • Introduction to the facilitators • Quick poll **(A)** • Programme aims and learning outcomes	Poll	1–11	Add who is delivering this section here
9.20 → 10.20	Getting to know one another **(A)**	See activity 1.1 in the activity guide	12	
10.20 → 10.35	**Break**			
10.35 → 10.40	Today's learning outcomes	-	14–15	
10.40 → 11.35	QI and the wider change context: • What is QI and the core principles • QI vs other types of change • Know-do gap • Model for Improvement (classroom teachback) **(A)**	Ask a few attendees to explain the Model for Improvement by question and PDSA	16–31	
11.35 → 11.40	**Comfort break**			
11.40 → 12.00	Who wants to be a coach with flair? **(A)**	See activity 1.2 in the activity guide	33–49	

Time	Topic	Activity	Slide numbers	Facilitator
12.00 → 12.45	**Lunch**			
12.45 → 1.45	Coaching improvement • What is coaching? Groups of 3–5 **(B)** • Coaching improvement vs coaching development	See activity 1.3 in the activity guide	51–58	
1.45 → 2.00	**Break**			
2.00 → 2.20	Telling vs coaching • Quick poll (icebreaker) **(A)** • An experiment in telling – pairs **(B)**	See activity 1.4 in the activity guide	60–66	
2.20 → 2.40	Listening • Coaching questions • Levels of listening • What makes a good coaching question? **(A)**	Ask the group what makes a good question	67–72	
2.40 → 3.00	Video • Coaching conversation example **(A)**	See activity 1.5 in the activity guide	73–74	
3.00 → 3.05	**Comfort break**			
3.05 → 3.35	GROW Coaching • GROW model • Coaching questions using GROW groups of 3–5 **(B)** • Effective coaching skills	See activity 1.6 in the activity guide	76–77	
3.35 → 3.55	Live coaching **(A)**	See activity 1.7 in the activity guide	78–80	
3.55 → 4.00	Close	-	81–83	

Activity Guide for session 1

Mural template

There are seven activities for this session.

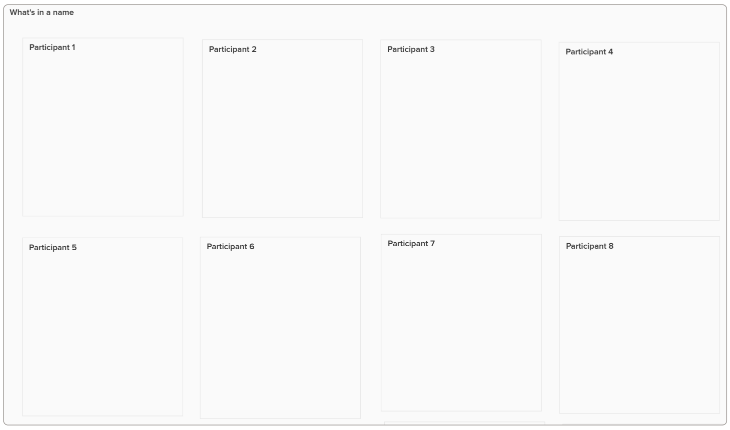
Activity		Template provided?	Breakout size	Duration	Group reflection*	Link
1.1	**Getting to know one another**	Yes	All	60 mins	–	→
1.2	**Who wants to be a coach with flair?**	Slides	All	20 mins	–	→
1.3	**Coaching vs mentoring**	Yes	3–5 people	10 mins	10 mins	→
1.4	**An experiment in telling**	No	Pairs	20 mins	–	→
1.5	**What makes a good coaching question (coaching conversation video)**	Video	All	15 mins	–	→
1.6	**GROW coaching questions**	Yes	3–5 people	20 mins	–	→
1.7	**Live coaching**	No	All	20 mins	–	→

***additional time to re-group, reflect and discuss breakout room activities**

Activity 1.1
Getting to know one another

The purpose of this activity is to help the group (and faculty) get to know one another. A simple template is provided, if needed. Delegates have five to ten minutes to use their individual space to explain their name (through words, images, icons etc.). Typically this will be their first name, middle name(s) and surname, or whatever they feel comfortable with, such as a nickname. This is then presented back to the group – to help with building relationships and to get to know one another better.

Example of template for activity 1.1.
Full template on Mural for session 1



A box is pre-created ahead of time for each delegate, shown in the image above. You may wish to add their name at the top instead of 'Participant 1' to make it easier to find and navigate to the box.

After the activity each box will look something like:

Session 1

Activity 1.2
Who wants to be a coach with flair?

This activity has been created to sense check learning from the content covered in the session so far. The main purpose is to determine: Does the group understand the key differences between QI work and other forms of change? You should review all of the questions and amend them to reflect your organisation's approach to change. Be sure to update both the question page and the answer page (two different slides). As with the real *Who Wants to be a Millionaire?*, the questions should start off easy and get progressively harder.

For the activity you should pose each question to the whole group. You may wish to ask each person to note down their answer before asking one person to respond to the question, or to add it into the chat (if virtual). After a couple of questions you could ask the group who has got all of the answers correct so far. Hopefully as you progress a few will still be in the running to win. Repeat this process until the end. Below can only be used once across the whole game by the whole group

- Phone a friend (ask FACULTY)
- 50:50 (Host can decide two between the four)
- Ask the audience a poll

You should do a practice run of this activity with a colleague before the session as this will help you focus less on how to use the slides and more on the activity itself.

Activity 1.3
Coaching vs mentoring

The purpose of this activity is to encourage coaches to consider their role and think about the differences and similarities of coaching and mentoring. We suggest breakout groups of around 3–4 people. There should be a separate space (or flipchart) for each group. They should populate the space with sticky notes and be prepared to summarise their findings with the wider group.

Example of template for activity 1.3
Full template on Mural for session 1

Group 1

10 mins

Task: What are the differences and similarities between Coaching and Mentoring? Add your thoughts in the section below

Coaching **VS** **Mentoring**

Activity 1.4
An experiment in telling

This is a fun, fast exercise, but it's a good reminder that just telling people what to do will only get you so far! The aim is to experience what it is like to be given advice – what it feels like to give advice and receive advice.

There are two parts to this activity.
No template is required.

1. Five minutes in pairs (using breakout rooms). One person should come up with a problem or issue they need help with. It could be related to work or outside of work. The other person is then tasked with giving them as much advice as possible to fix the problem. After the five minutes, bring everyone back to the main room and ask for some feedback on how it felt.
2. Another five minutes in pairs (using breakout rooms). Pairs should focus on the problem or issue they discussed before. This time the other person uses the coaching questions provided to work through the issue. After the five minutes, bring everyone back to the main room and get some more feedback.

Session 1

Activity 1.5

What makes a good coaching question? (Coaching conversation video)

This activity uses two short videos of a re-enacted coaching conversation, created for this programme. The purpose is to introduce the GROW model. It is broken down into two parts (GR of the GROW model, and OW of the GROW model). As faculty you may prefer to do live coaching or create your own videos instead.

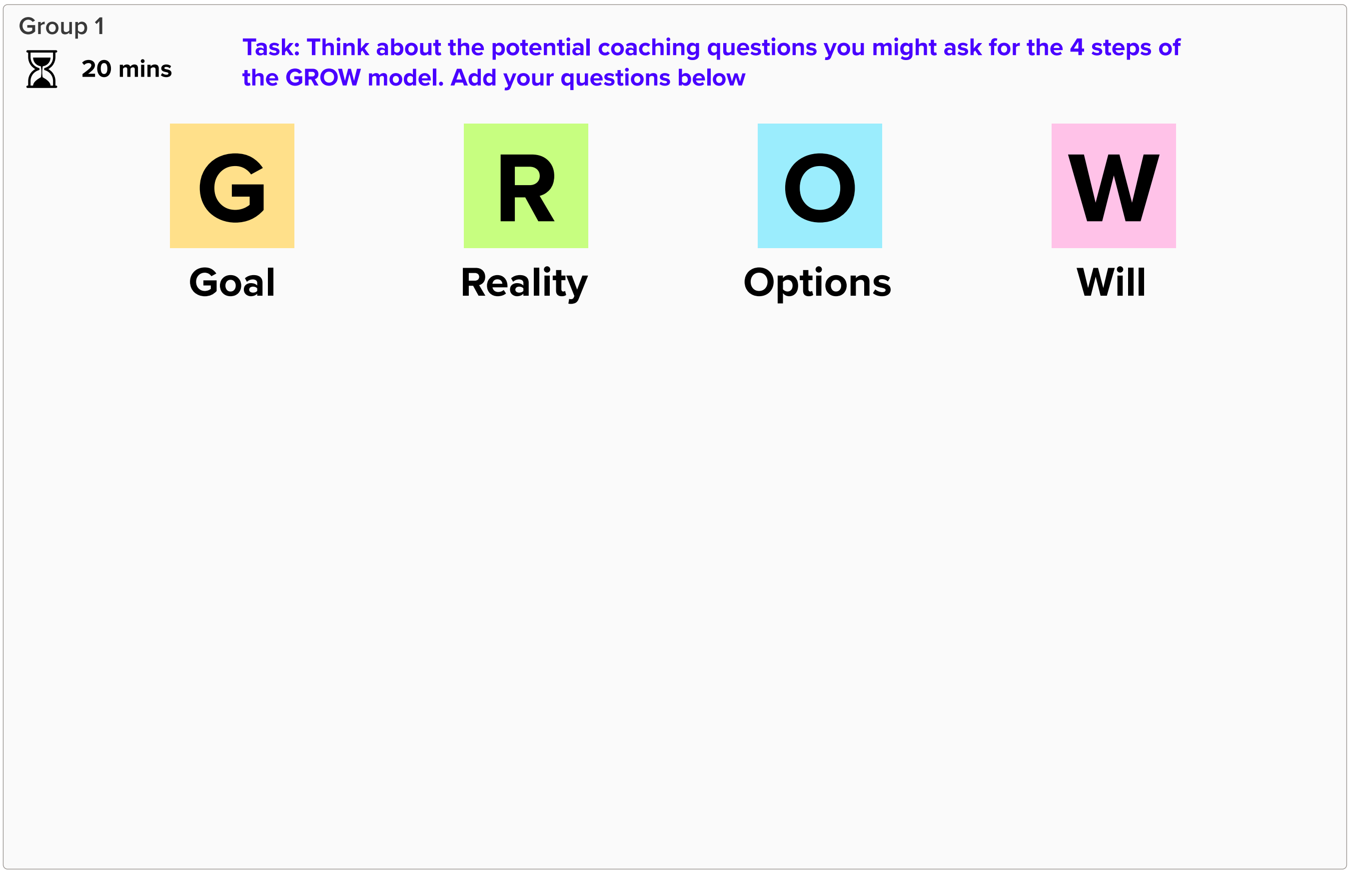
This could be completed as a self-directed task instead, if you prefer. Delegates would be asked to watch the videos and record any key things they noticed about the conversation. They would then discuss this and the GROW model with their mentor.

Case study - GROW Model (part 1) – 3:52

Case study - GROW Model (part 2) – 6:23

Activity 1.6
GROW coaching questions

Using the same breakout groups as activity 1.3, the groups will each have a space to add sticky notes under the four sections of the GROW model. The purpose is to help them form their thinking about what coaching questions they might ask when using the GROW model with improvement teams.



Example of template for activity 1.6
Full template on Mural for session 1

Activity 1.7
Live coaching

This activity asks you to take on the role of a 'coachee'. The purpose of the activity is to provide the group with an opportunity to practise and experience GROW coaching in real life. You should plan in advance for a topic that you would like support with – it should be real and contemporary.

This is an all-group activity. You may wish to have a facilitator as well as a 'coachee' to make this run smoothly. The facilitator's role is to invite each group (from the previous activity) to ask the coachee one question that they have developed from the previous activity.

Each group should have an opportunity to ask the 'coachee' one question on the Goal, one on the Reality, one on Options and one on Will. So in total if you had five breakout groups for the previous activity, you will have perhaps five questions on Goal, five on Reality, five on Options and five on Will. You may need to use some intuition and adjust accordingly if you have naturally come to the end of one section of GROW, then move on to the next.

Hopefully by the end of this process the coachee will have worked through their issue using a coaching approach and an improved outcome will have been achieved. The facilitator may wish to use an example of summarising and reflecting to bring the activity to a close.

Coaching and the Foundations of QI

SESSION 2

Tasks you should undertake before the session

- Prepare the templates for the activities
- Review and tailor the slides to suit your organisation. Update the slide numbers in the table on the next page(s)
- Allocate a trainer to each section of the session
- Prepare the icebreaker poll (after lunch), if you are using these
- Read the activity guide and prepare the activities
- Check that the handbook numbers indicated on the slides are correct (only applies if your Programme Leader has adapted or tailored the handbook)
- Share the slides with delegates beforehand (if applicable)
- Review the teachback slides (at the end of the slide set) and change the subjects, where needed.

Tasks the delegates should complete before the session

- Meet with their buddy and reflect on session 1
- Watch the GROW coaching case study videos (if not done in the classroom) and discuss with their mentor.

Tasks you should undertake after the session

- Send out the session evaluation form and conduct a debrief with the faculty once delegates have responded (this can be done immediately after the session)
- Share the slides with delegates (if applicable)
- Share the link to the Mural (or whichever platform you use) so delegates can access the activity content afterwards (if virtual).

Learning outcomes for session 2

- Understand the concepts of coaching improvement and the difference between coaching and advising
- Be able to explain your role as a Quality Coach to different stakeholders
- Be able to effectively contract as a coach with an improvement team
- Reflect on your role as a coach in relation to the key stages of QI work
- Be able to use the coaching circle as a useful method for supporting your Quality Coach peers.

Schedule

(A) indicates this topic has an in-classroom activity **(B) indicates this topic has a breakout room/small group activity**

More complex activities, particularly those in breakout rooms, have detailed explanation in the activity guide. The activity guide for session 2 is located below.

The timings for all sections with an activity include time for any teaching and/or explanations required, as well as the activity itself and any group reflection after completing the task.

Time	Topic	Activity	Slide numbers	Facilitator
9.00 → 9.15	Introduction to the day: • Housekeeping and agenda • Introduction to the facilitators • Programme aims and learning outcomes • Today's learning outcomes		1–12	Add who is delivering this section here
9.15 → 10.25	GROW coaching practice in groups of 3 **(B)**	See activity 2.1 in the activity guide.	13	
10.25 → 10.35	**Break**			
10.35 → 10.45	Reflection on coaching **(A)**	Ask the group to reflect on the last activity	15	
10.45 → 11.30	Contracting as a coach • What do we mean by 'contracting' • Contracting matrix groups of 3–5 **(B)** • Group reflection	See activity 2.2 In the activity guide	16–18	
11.30 → 12.00	Facilitation tips • Quality Coaches wear many hats • Facilitation advice • 7 Step meeting process (video)		19–24	
12.00 → 12.45	**Lunch**			
12.45 → 2.10	Coaching circle • Icebreaker **(A)** • Coaching circles groups of 5–8 **(B)**	Set up a poll on yourselves (see slide notes) See activity 2.3 in the activity guide	26–29	
2.10 → 2.20	**Break**			

Time	Topic	Activity	Slide numbers	Facilitator
2.20 → 3.10	Telling vs coaching • Key pointers for supporting aim setting • Role-play coaching an aim • Coaching aim scenario groups of 3 **(B)** • Group reflection	See activity 2.4 in the activity guide	31–37	
3.10 → 3.15	**Comfort break**			
3.15 → 4.10	Coaching the QI process • Pitfalls of coaching • Coaching 6 stages of a QI process, groups of 3–5 **(B)** • Group reflection	See activity 2.5 in the activity guide	39–44	
4.10 → 4.20	Close and self-directed learning • Recap of learning outcomes • Just-in-Time training and self-directed learning	-	45–49	

Session 2

Activity Guide for session 2

Mural template

There are five activities for this session.

Activity		Template provided?	Breakout size	Duration	Group reflection*	Link
2.1	**GROW coaching trio practice**	No	Groups of 3	60 mins total	–	→
2.2	**Contracting matrix**	Yes	3–5 people	25 mins	15 mins	→
2.3	**Coaching circle**	No	5–8 people	60 mins	–	→
2.4	**Coaching an aim statement**	Yes	3–5 people	20 mins	10 mins	→
2.5	**Coaching the QI process**	Yes	3–5 people	40 mins	10 mins	→

***additional time to re-group, reflect and discuss breakout room activities**

Activity 2.1

GROW coaching trio practice

The purpose of this activity is provide an opportunity for all delegates to practise GROW coaching with their peers, and to receive feedback.

You should split the group into groups of three. If you are short then you may need to use one or two pairs, or ask a faculty member to join a group to balance out the numbers.

This activity will take 60 minutes (3 × 20 mins coaching practice). There are three roles – a coach, a client and an observer.

- **Round 1:** The coach and client should spend 15 minutes working through a real situation using the GROW technique. The client can use a situation from work or outside of work. The coach should aim to use the GROW model to coach the client through the situation. The observer's role is to note if advice was given, whether the GROW model was properly followed, what the coach did well and to keep an eye on time. At the end of the session the trio should spend five minutes describing how it felt as client or coach and what the observer noted.
- **Round 2:** Everyone should rotate (client becomes observer, coach becomes client, observer becomes coach). Use the same approach (15 mins coaching, 5 mins debrief)
- **Round 3:** Everyone should rotate again (client becomes observer, coach becomes client, observer becomes coach). Use the same approach (15 mins coaching, 5 mins debrief).

After the activity and when everyone is back in the main room, you should ask everyone to reflect using the questions on the slide.

Activity 2.2
Contracting matrix

The purpose of this activity is to encourage coaches to think about how they might broach the initial contracting conversation with their teams. You should split the group into breakout groups of three to four people. There should be a separate matrix or grid for each group to work on. A suggestion is included in each box to help get the conversation started.

Example of template matrix for activity 2.2.
Templates for each group on Mural for session 2

Things I will do...	**Things I will <u>not</u> do...**
Help you work out the aim of your project	Tell you exactly what to do and when
Things I can do...	**Things I <u>cannot</u> do...**
Share improvement tools	Do all the work for you

Activity 2.3
GROW coaching trio practice

Group size should ideally be between five and eight. You should explain the format and principles of the coaching circle (using the slides and information in the handbook). It is important that everyone understands how these will run and that they are a recurrent activity in the programme. You may wish to identify those in the group that have a topic they would like to be coached on – this will help with setting up the breakout rooms.

As facilitators you may wish to join the rooms for the first run – to help field questions and to take on the role of timekeeper – so everyone else can focus on the activity itself.

Activity 2.4

Coaching an aim statement scenario

Use the same groups as in activity 2.2. Each group will use the scenario provided to role-play coaching an aim. You should change the scenario to ensure it is relevant to your local context.

The intention is for the delegates to have a bit of fun with one another – to foster relationships, but also to think about how they might coach and facilitate an aim setting conversation.

You will need to drop in to the breakout rooms to observe and to help teams with any queries. The main challenge is that the aim isn't a QI aim (it has a solution!) and so more thought is needed to help form this into a QI project.

Example of information for activity 2.4.
Information for each group on Mural for session 2

Task

20 mins

You will need to adopt roles in this activity (role play). One of you will be the "project lead" (see below), one will be a QI coach and others will be either observers and/or project team members. Add your nominated roles below

Coach:	ADD THE COACHES NAME HERE	**Project Lead:**	ADD THE PROJECT LEADS NAME HERE	**Observer:**	ADD THE OBSERVERS NAME HERE	**Team member:**	ADD THE TEAM MEMBERS NAME HERE

- The **coach's role** is to use coaching questions to help the project lead refine her project aim, with an emphasis on engagement, outcomes and use of QI methodology.
- The **project lead's role** is to respond (with creative license) to the questions of the coach - fill in the gaps and lean in to your character!
- Others' roles are to engage in the conversation as additional team members, or to observe and provide feedback at the end.

Project Background
The QI Coach has been contacted for QI coaching support by a Team Lead in their division. She says she wants to improve morale in the service.

Staff are reporting low morale and feel management aren't supportive, change isn't well communicated and that the team is disjointed. Baseline data includes:

- 45% of staff in staff survey said they would recommend working here to friends/family
- 63% of staff say they are considering leaving the team within the next 12 months
- 27% of staff report having a good relationship with their manager.
- 59% of staff say they feel disconnected from the team and their colleagues.

The project is led by an enthusiastic service lead, with sponsorship from the Chief Nurse. The project lead went to a conference recently and heard from a service that transformed their staff experience by introducing a daily 15 min huddle, amongst other things. In the huddle there is a set time allocated specifically for health and wellbeing. Her aim is that within the next 3 months, Orange Team will have implemented a new huddle, and it will be embedded into daily practice.

The project lead is meeting with the coach to discuss how to progress this project and ensure a positive outcome is achieved.

Session 2

Activity 2.5
Coaching the QI process

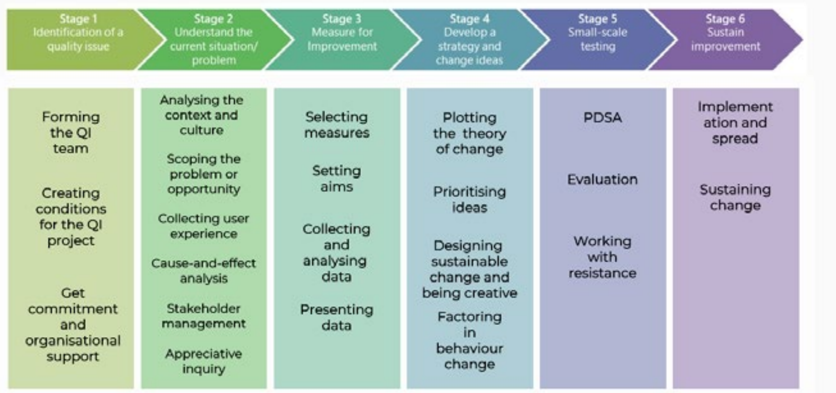
Continue with the same groups as on the previous tasks. In groups, delegates are asked to think about the following questions/tasks that they might consider at the various stages of the QI process.

Along the top are the six stages of the QI process (amend as required if your organisation uses something different). Below the stages are some of the key aspects of the stage. For example for stage 1: Identification of a quality issue, the key aspects are forming the QI team, creating conditions for QI and getting commitment and support.

Along the left-hand side are the five things the groups should consider. They should fill in the blank space with their ideas and questions. The exercise can be done rapidly (e.g. for 20 minutes) or for a longer period of time to allow for a more thorough conversation. You can ask them to re-visit this later or discuss with their mentor.

The purpose of this activity is to encourage coaches to think about how they can and will support teams through the QI process. It can also help them to learn more about the QI process and common challenges.

Consider your role as a coach in the stages of any given QI project



what you'd do to support the tasks/ stages of a project

what you wouldn't be willing to do as a coach

what the challenges / pitfalls might be for each stage

what questions you might ask

what tools could be used

Working with People

SESSION 3

Tasks you should undertake before the session

- Prepare the templates for the activities
- Review and tailor the slides to suit your organisation. Update the slide numbers in the table on the next page(s)
- Allocate a trainer to each section of the session
- Read the activity guide and prepare the activities
- Check that the handbook numbers indicated on the slides are correct (only applies if your Programme Leader has adapted or tailored the handbook)
- Share the slides with delegates beforehand (if applicable)
- Send the group a reminder to read up on the teachback topics and to complete the Working Styles questionnaire (available as part of the Training Resource Pack).
- Update the teachback topics, if you changed them last time.

Tasks the delegates should complete before the session

- Complete the Working Styles questionnaire
- Read the Pitfalls of Coaching section of the handbook (page 103)
- Read the Group Dynamics section of the handbook (page 136).

Tasks you should undertake after the session

- Send out the session evaluation form and conduct a debrief with the faculty once delegates have responded (this can be done immediately after the session)
- Send out a reminder for the self-directed learning from the session and .CC in the mentors
- Share the slides with delegates (if applicable)
- Share the link to the Mural (or whichever platform you use) so delegates can access the activity content afterwards (if virtual).

Learning outcomes for session 3

- Be able to promote an environment that encourages team members to contribute equally to the development of improvement work
- Be able to assimilate QI knowledge and facilitation skills that support teams to progress through the different stages of QI work
- Have an awareness of different working styles and how they may interact in a group
- Understand the importance of psychological safety in improvement efforts
- Be able to apply simple methods to promote psychological safety within groups.

Schedule

(A) indicates this topic has an in-classroom activity **(B) indicates this topic has a breakout room/small group activity**

More complex activities, particularly those in breakout rooms, have detailed explanation in the activity guide. The activity guide for session 3 is located below.

The timings for all sections with an activity include time for any teaching and/or explanations required, as well as the activity itself and any group reflection after completing the task.

Time	Topic	Activity	Slide numbers	Facilitator
9.00 → 9.15	Introduction to the day: • Housekeeping and agenda • Introduction to the facilitators • Programme aims and learning outcomes • Today's learning outcomes		1–12	Add who is delivering this section here
9.15 → 10.00	Just-in-Time learning and teachback **(B)**	See activity 3.1 in the activity guide	13–14	
10.00 → 10.15	**Break**			
10.15 → 11.15	Project-based learning discussion Working styles **(B)**	See activity 3.2 in the activity guide	16–19	
11.15 → 11.20	**Comfort break**			
11.20 → 12.00	Human Side of Change • Technical vs adaptive change • Adaptive barriers to change **(A)** • Psychological safety • Intro to Liberating Structures	Ask the group to reflect on the adaptive barriers to change slide – what do they recognise?	21–32	
12.00 → 12.45	**Lunch**			
12.45 → 2.10	Liberating Structures • Mad tea **(A)** • Liberating Structures–TRIZ **(B)**	See activities 3.3 and 3.4 in the activity guide	34–58	

Time	Topic	Activity	Slide numbers	Facilitator
2.00 → 2.15	**Break**			
2.15 → 3.00	Appreciative inquiry • The 5D model for AI • Money management: an appreciative inquiry **(B)**	See activity 3.5 in the activity guide	60–67	
3.00 → 3.30	Close and self-directed learning • Recap of learning outcomes • Explain the All Teach, All Learn session, allocate time slots for session 5 and discuss topics that delegates could teach	–	68–71	

Activity Guide for session 3

Mural template

There are five activities for this session.

Session 3

Activity		Template provided?	Breakout size	Duration	Group reflection*	Link
3.1	**Teachback**	No	Groups of 3	45 mins	–	→
3.2	**Working styles**	Yes	4 breakout rooms total	35 mins	10 mins	→
3.3	**Mad tea**	Slides	All	10 mins	–	→
3.4	**Liberating Structures**	Yes	3–5 people	45 mins	10 mins	→
3.5	**Money management: an appreciative inquiry**	Yes	All	30 mins	10 mins	→

***additional time to re-group, reflect and discuss breakout room activities**

Activity 3.1
Teachback

Teachback aims to 'flip the classroom', by asking delegates to have a go at teaching their peers on a basic QI concept or tool. The purpose of this activity is to provide a safe learning space for delegates to practise the idea of 'Just-in-Time' learning. There are added benefits – such as enabling the group to 'top-up' QI knowledge as their peers teach them about a QI tool/concept. Additionally, it allows the group to build up their 'QI toolbox' by perhaps saving a copy of a good presentation or providing ideas for how they might present a specific topic to a team they are coaching.

In this task, you should create three to six breakout groups of (ideally) between two to four people. Suggested topics are provided on the slides – feel free to change these (note that if you do, you will need to change the slide at the end of session 2 as well as this is set as homework). Each group should be assigned a topic at random. They have ten minutes to prepare a quick presentation to bring back to the main room. They should pitch the topic to someone who is a QI beginner. The teaching should last no more than five minutes, with an additional two minutes for Q&A after. Each group should have time to present so adjust timings accordingly for large groups. The group can use existing content to help with the teaching (for example, images from google).

Teachback is used a few times throughout the programme. Please ensure different topics are covered each time.

Activity 3.2
Working Styles

Delegates must complete the Working Styles questionnaire before undertaking this task. You should remind them to complete this in session 2 (it is included in the slides as a reminder) as well in the morning and break of session 3.

The purpose of the activity is to help coaches understand that people think and behave differently from them and others. These differences should be celebrated. Coaches may need to flex their approach based on how different people work.

There are three stages to this task:

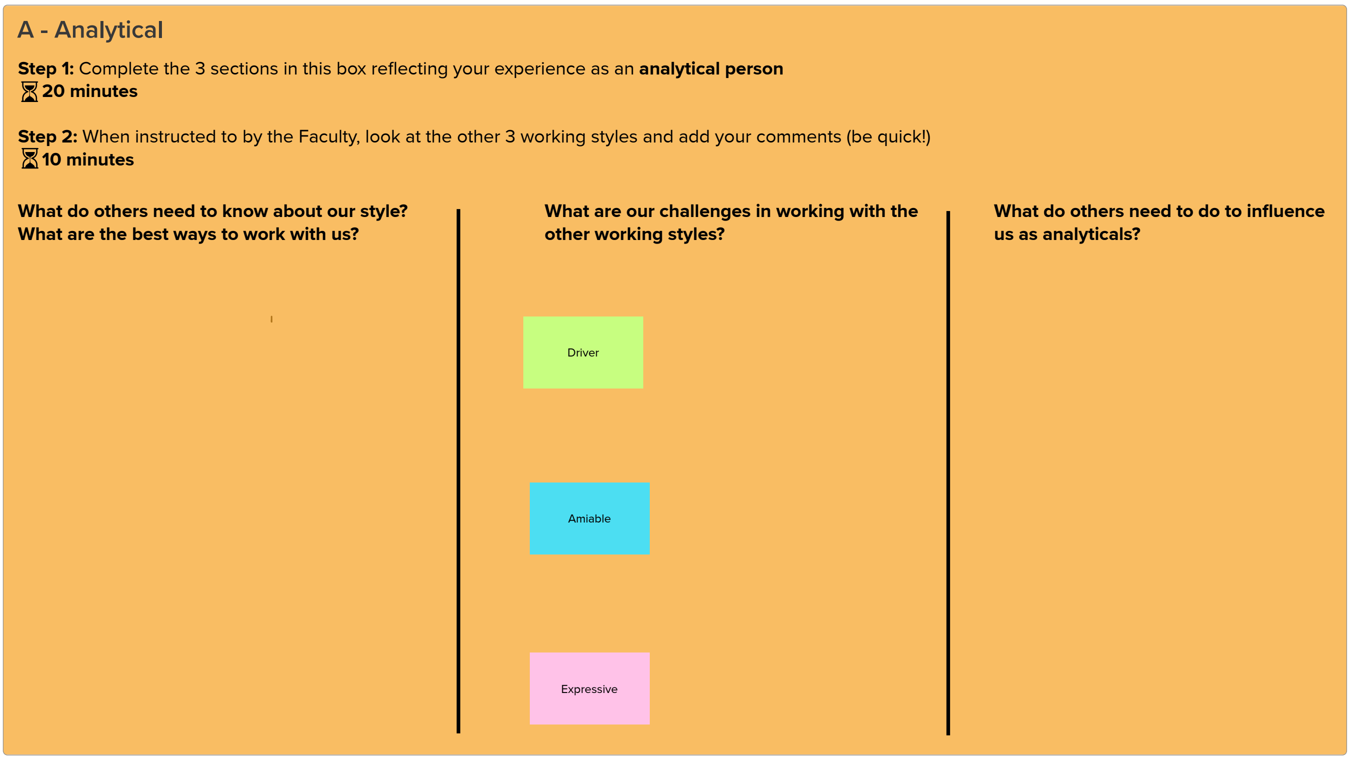
1. Delegates should let the facilitator know which 'working style' they were identified as through the questionnaire. If they are a combination of two (equal score for two) then they just need to pick one of them. Delegates should be grouped together by working style, so you should have four breakout groups. Facilitators may need to join a breakout group for balance. You should then explain the task and then open the breakout rooms.

Step 1 should take 20 minutes. Each group should use their box and respond to the different prompts. The image below shows all four boxes and an example template for the 'Analytical' working style. The faculty may need to join any groups that have only one person to help them complete this stage.

Example of templates for activity 3.2

2 Upon completing their respective boxes, delegates should move on to step 2 – everyone should move at the same time to avoid confusion.

This step takes ten minutes – and so will be quick fire. Groups should look at each group's completed boxes and add any additional comments (using sticky notes). It can be helpful to have different colour sticky notes for different groups so it is clear who added what.



Example of template for 'Analytical' style for activity 3.2. *Templates available on Mural for session 3.*

3 After all comments have been added the groups should look again at their own box and read what others have added (five mins max).

Everyone should then return to the main group to reflect and feedback (ten mins).

Activity 3.3
Mad tea

This is a short icebreaker activity. We have created a set of slides to facilitate the activity. Please see the Mad Tea page on the Liberating Structures website[6] for more detail. If delivering virtually you will just need to use paired breakout rooms.

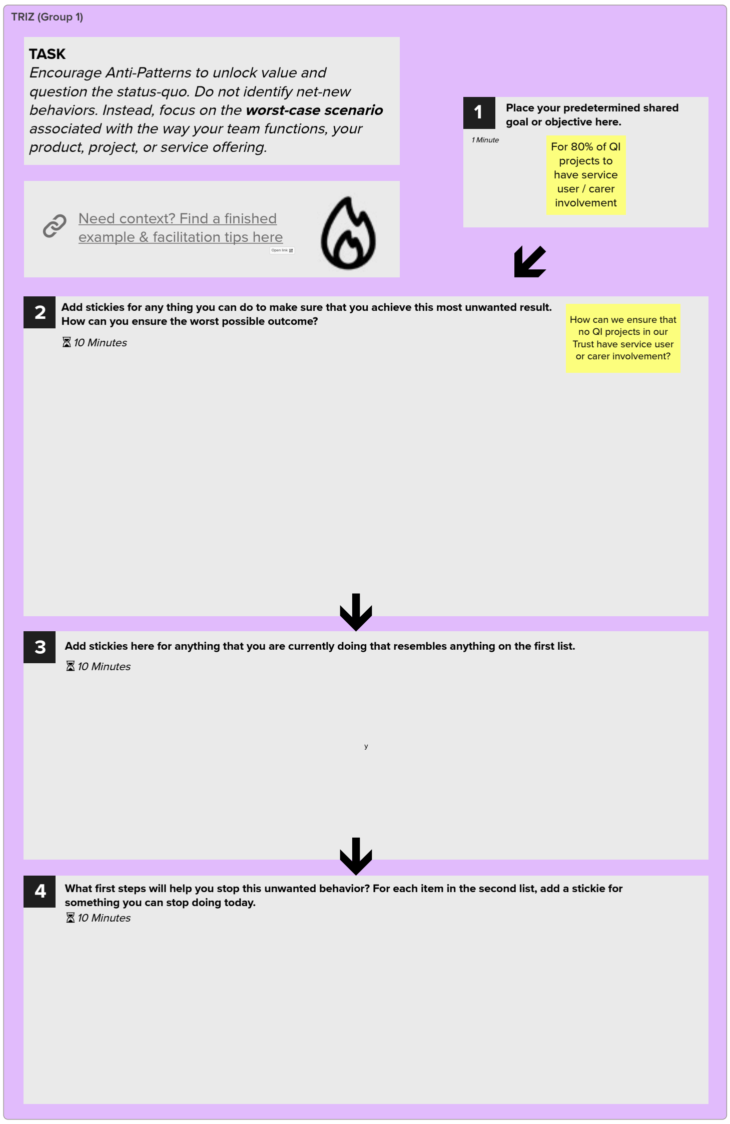
6 https://www.liberatingstructures.com/mad-tea

Activity 3.4
Liberating Structures

See the Making Space with TRIZ page[7] on the Liberating Structures website.

This activity uses TRIZ to explore how we can improve patient involvement in improvement efforts. The purpose of TRIZ is to help teams explore a problem from a different angle – useful in understanding a problem and how we relate to it, and to support the development of change ideas. The general structure of TRIZ is:

- Delegates have two minutes alone to think of everything they could do to have no patient involvement in QI. They should have fun with this and think outside of the box.
- Delegates should go into breakout groups of three to five people to discuss their findings (five minutes). A template is provided below to help you with this activity. The template could be for each individual, group of four or for the whole group. Add all thoughts into box 2 of the template.
- Using box 3, ask and challenge one another: what are they doing – even in a small way – that is on this list?
- Finally – and importantly – use the final stage of TRIZ. We've combined this with 15% solutions so the question isn't just 'what can you stop?' but also 'what steps can you take now to stop this?'. Again, you could do this as an independent or group task or use the TRIZ structure.



Example of template for activity 3.4.
Template available on Mural for session 3

7 https://www.liberatingstructures.com/6-making-space-with-triz/

Activity 3.5

Money Management – an appreciative inquiry

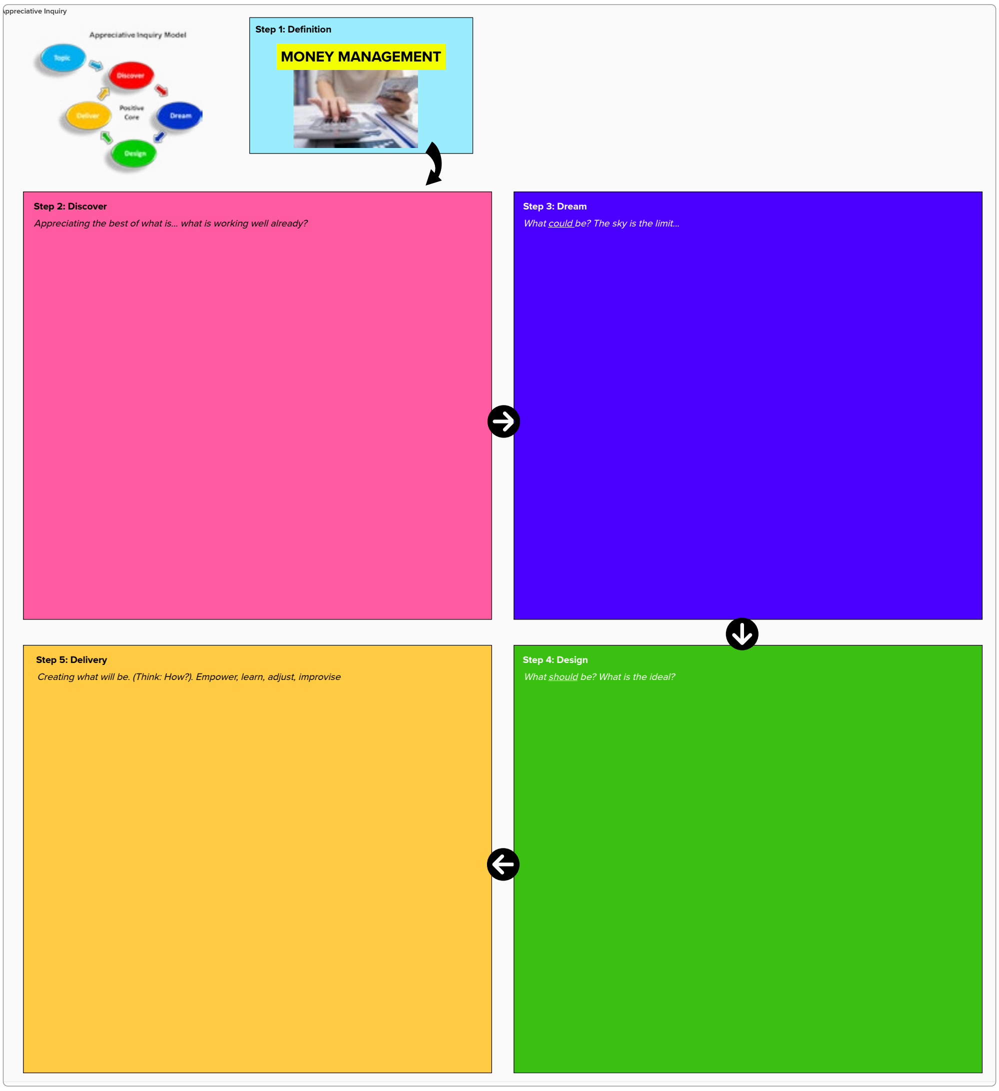
The purpose of this activity is to experience an appreciative inquiry.

You will guide the group collectively through an appreciative inquiry, focusing on the topic of money management (budgeting). You will use the 5D model to facilitate the activity.

- Stage 1: Define has already been decided (the topic is money management)
- Stage 2: Discover – you should spend five to ten minutes as a group discussing the things that are already working well regarding money management. Document the discussion using the template below.
- Stage 3: Dream – spend five to ten minutes on this stage
- Stage 4: Design – spend five to ten minutes on this stage
- Stage 5: Delivery – you may wish to combine 15% solutions into this – ask each individual to consider what small step they can take towards achieving the goal.

Example of template for activity 3.5.

Template available on Mural for session 3



Session 4

Working with People

SESSION 4

Tasks you should undertake before the session

- Prepare the templates for the activities
- Review and tailor the slides to suit your organisation. Update the slide numbers in the table on the next page(s)
- Allocate a trainer to each section of the session
- Read the activity guide and prepare the activities
- Check that the handbook numbers indicated on the slides are correct (only applies if your Programme Leader has adapted or tailored the handbook)
- Share the slides with delegates beforehand (if applicable)
- Read the Context for Successful Quality Improvement[8] article
- If you are not familiar with teaching about the role of context in change/QI then read further articles including:
  - The influence of context on quality improvement success in health care: a systematic review of the literature.[9]
  - What Will it Take to Lead the Continual Improvement and Innovation of Health Care in the Twenty-first Century?[10]
- Read the article on MUSIQ[11]
- Read the article NHS Sustainability Model.[12]

Tasks the delegates should complete before the session

- Start preparing for All Teach, All Learn (for session 5)
- Read the Stakeholders section of the handbook (page 25)
- Meet with their mentor and buddy

Tasks you should undertake after the session

- Send out the mid-point 'self-evaluation tool' if you are using this to evaluate the programme
- Send out the session evaluation form and conduct a debrief with the faculty once delegates have responded (this can be done immediately after the session)
- Send out a reminder for the self-directed learning from the session and .CC in the mentors
- Share the slides with delegates (if applicable)
- Share the link to the Mural (or whichever platform you use) so delegates can access the activity content afterwards (if virtual).

8 The Health Foundation (2015). https://www.health.org.uk/publications/context-for-successful-quality-improvement

9 Kaplan H., Brady P. W., Dritz M. C., et al. (2010). The influence of context on quality improvement success in health care: a systematic review of the literature. *Milbank Quarterly*. www.ncbi.nlm.nih.gov/pmc/articles/PMC3037175/

10 Batalden, P. and Splaine, M. (2002). What Will it Take to Lead the Continual Improvement and Innovation of Health Care in the Twenty-first Century? *Quality Management in Health Care.* https://journals.lww.com/qmhcjournal/Abstract/2002/11010/What_Will_it_Take_to_Lead_the_Continual.8.aspx

11 https://qualitysafety.bmj.com/content/21/1/13

12 https://www.england.nhs.uk/wp-content/uploads/2021/03/qsir-sustainability-model.pdf

Learning outcomes for session 4

- Be able to explain your role as a Quality Coach to different stakeholders
- Be able to support teams to understand barriers and enablers, which may affect the sustainability of interventions
- Be able to use a simple tool to evaluate the sustainability of QI work
- Recognise the importance of context in supporting improvement efforts.

Schedule

(A) indicates this topic has an in-classroom activity **(B) indicates this topic has a breakout room/small group activity**

More complex activities, particularly those in breakout rooms, have detailed explanation in the activity guide. The activity guide for session 4 is located below.

The timings for all sections with an activity include time for any teaching and/or explanations required, as well as the activity itself and any group reflection after completing the task.

Time	Topic	Activity	Slide numbers	Facilitator
9.00 → 9.15	Introduction to the day: • Housekeeping and agenda • Introduction to the facilitators • Programme aims and learning outcomes		1–9	Add who is delivering this section here
9.15 → 10.20	Coaching circle **(B)**	See activity 4.1 in the activity guide	10–12	
10.20 → 10.35	**Break**			
10.35 → 11.40	Context in QI • Today's learning outcomes • Defining context and the microsystem, macrosystem and environment model • Microsystem, macrosystem and environment–consider a QI project you are working on **(B)**	See activity 4.2 in the activity guide	14–24	
11.40 → 12.00	Cultures role in context		25–28	
12.00 → 12.45	**Lunch**			

Time	Topic	Activity	Slide numbers	Facilitator
12.45 →1.05	Affinity diagrams • Paperclip activity **(A)** • Affinity diagrams example	See activity 4.3 in the activity guide	30–33	
1.05 →1.45	Stinky fish **(B)**	See activity 4.4 in the activity guide	34–35	
1.45 →2.00	**Break**			
2.00 →2.45	Measuring sustainability *Decide if you want to teach NHS sustainability model, MUSIQ tool, or both, and remove unwanted slides if necessary* • NHS sustainability model or MUSIQ • Activity: have a go! **(B)**	See activity 4.5 in the activity guide	37–46	
2.45 →3.45	Explaining the role of a coach • 3 groups: look at how you would explain the role a Quality Coach to different stakeholders **(B)** • Reflection	See activity 4.6 in the activity guide	48–50	
3.45 →4.00	Close and self-directed learning • Recap of learning outcomes • Reminder: All Teach, All Learn session	—	51–53	

Activity Guide for session 4

Mural template

There are six activities for this session.

Session 4

Activity		Template provided?	Breakout size	Duration	Group reflection*	Link
4.1	**Coaching circle**	No	Groups of 5–8	60 mins	–	→
4.2	**Context – microsystem, macrosystem and environment**	Yes	3–5 people	30 mins	15 mins	→
4.3	**Affinity diagrams**	Yes	All	15 mins	–	→
4.4	**Stinky fish**	Yes	3–5 people	30 mins	15 mins	→
4.5	**Measuring sustainability**	Yes	3–5 people	30 mins	10 mins	→
4.6	**Explaining the role of the coach**	Yes	3–5 people	30 mins	15 mins	→

***additional time to re-group, reflect and discuss breakout room activities**

Activity 4.1
Coaching circle

This is a repeat of the activity from session 2 – see activity 2.3 and further information in the slide set for session 2 for more details.

Group size should ideally be between five and eight. You should explain the format and principles of the coaching circle (using the slides and information in the handbook). It is important that everyone understands how these will run and that they are a recurrent activity in the programme. You may wish to identify those in the group that have a topic they would like to be coached on – this will help with setting up the breakout rooms.

As facilitators you may wish to join the rooms for the first run – to help field questions and to take on the role of timekeeper – so everyone else can focus on the activity itself.

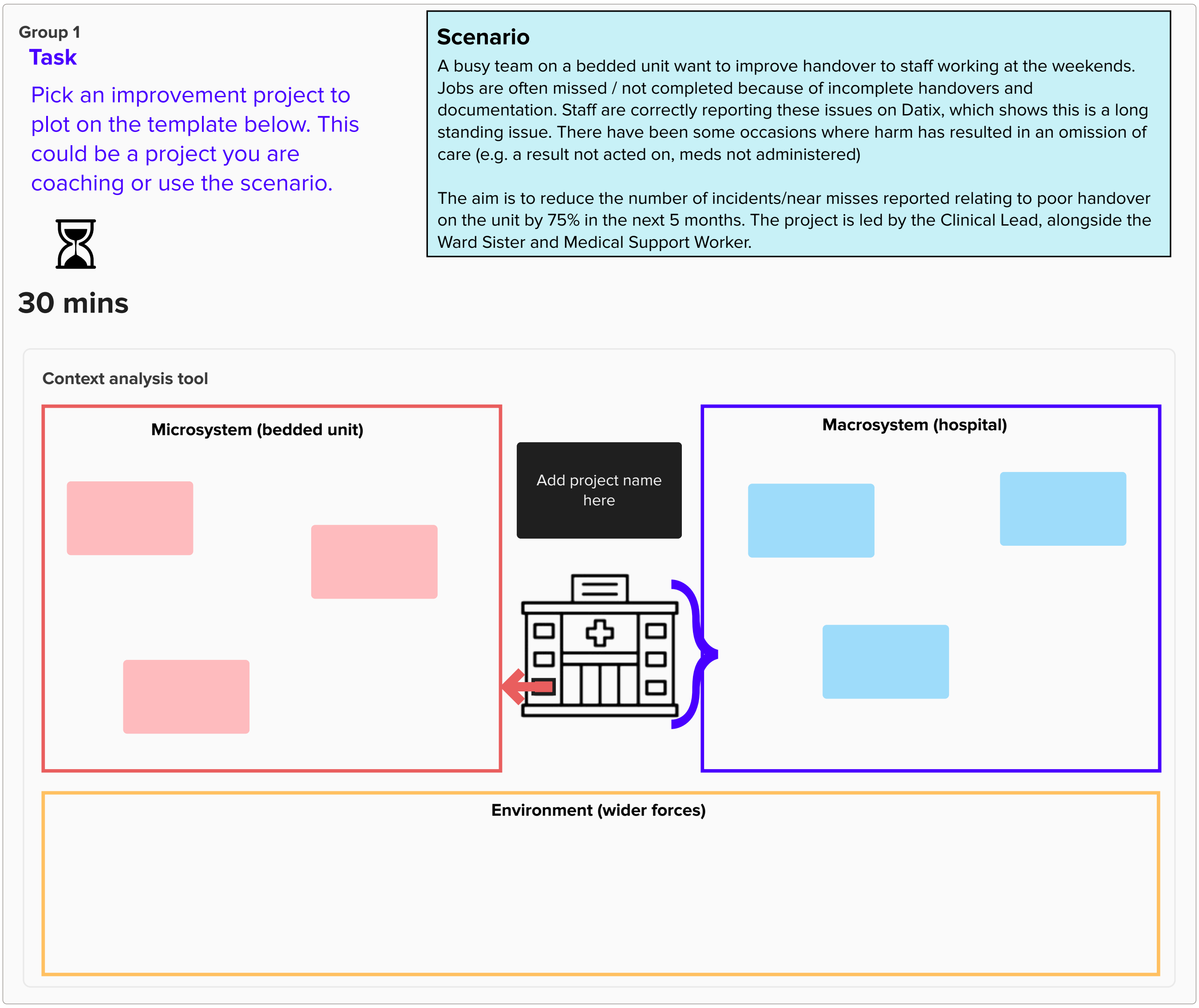
Activity 4.2

Context–microsystems, macrosystems and environment

Groups should each be given a template (see below) to support them with this activity. The purpose is to explore QI work using the microsystem, macrosystem and environment model. They should consider either the given scenario or one of the QI projects they are coaching.

They should aim to have at least five points for each section. If they have any questions or are unsure about differentiating between any of the three modes then they should seek guidance from the faculty.

Example of template for activity 4.2.
Template available on Mural for session 4



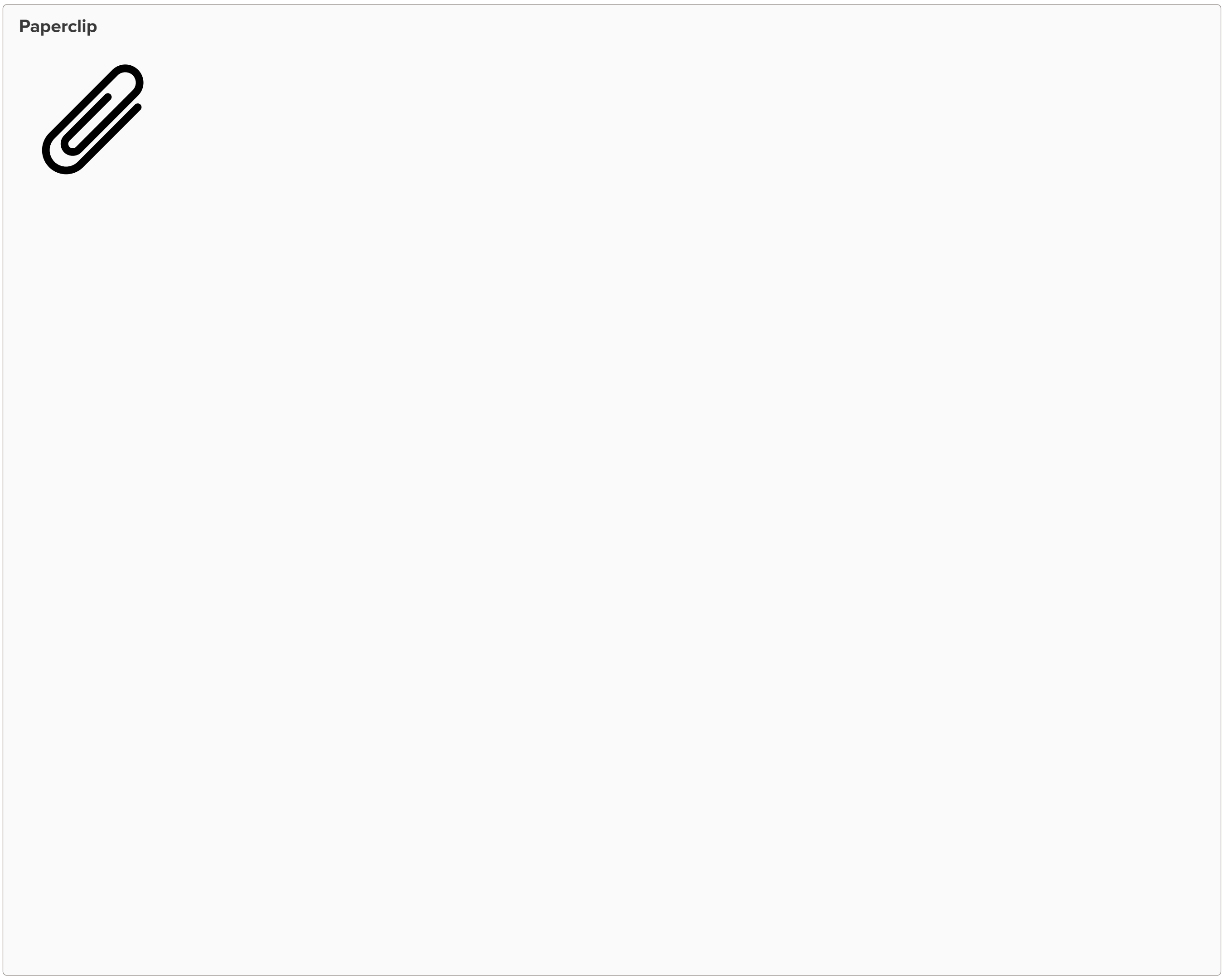
Activity 4.3

Affinity diagrams – the humble paperclip

This activity serves as an icebreaker after lunch. It teaches the concept of affinity diagrams through a simple, fun example. The idea is for delegates to add as many ideas as possible to the Mural (or flipchart) in a short time period (e.g. five mins). They should be encouraged to build on one another's ideas – with the ambition of coming up with 100 uses for a paperclip.

After the five minutes are up, your role will be to facilitate the creation of an affinity diagram, through the identification and grouping of key themes (example themes include: jewellery, fashion, hygiene, tool, paper products etc.) Note these are just an indication; in practice you should work with the group to identify the themes based on the ideas generated. Once an affinity diagram has been created, you will be able to move on to the slides to go over the case study and move on to creative thinking.

Example of template for activity 4.3.
Template available on Mural for session 4



Activity 4.4

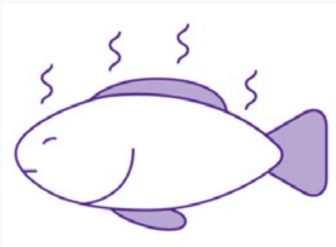
Stinky fish

The purpose of this activity is to provide delegates of the programme with a safe space to share their key challenges and questions about QI coaching and the programme content. The stinky fish is a metaphor for 'that thing that you carry around but don't like to talk about – but the longer you hide it, the stinkier it gets.' By putting 'stinky fish' on the table, delegates relate to each other, get more comfortable sharing, and uncover areas for learning and development.

For this activity, delegates should go into breakout groups of three to five people. Each group should consider each question on the template, identify their own 'stinky fish' for each question, and document the responses. After 20–30 minutes, groups should return to the main room and feed back on the stinky fish they identified, and how it felt to address. Allow 15 minutes for this stage. Be sure to explain that 'putting fish on the table' is an important first step to confronting and dealing with challenges and concerns, and to remind delegates that support is available from their mentor and buddy.

The template below is from Fearless Culture (CC-BY-SA) based on Hyper Island's original idea. More detail is on their website.[13]

What are your fears, concerns, anxieties and questions that you have been to afraid to ask or discuss?



13 https://toolbox.hyperisland.com/stinky-fish-13d9ce8d-e64f-4085-8a06-8d212c627788

Activity 4.5
Measuring sustainability

As faculty, you should decide whether you want to teach the NHS Sustainability Model,[14] the IHI MUSIQ tool[15] (note this links to an Excel file download), or both. More information on each model is in the slide set for session 4, so the slides will need amending unless you are teaching both.

Delegates should apply the taught model to improvement work they are coaching, or other QI work. Reflect on how useful they found it and how they might use it with teams they coach.

14 https://www.england.nhs.uk/wp-content/uploads/2021/03/qsir-sustainability-model.pdf
15 https://qi.elft.nhs.uk/wp-content/uploads/2015/08/musiq-calculator.xlsx

Activity 4.6
Explaining the role of the coach

This activity aims to build delegate confidence in being able to readily explain the role of a Quality Coach in detail. In this task each group should spend 30 minutes considering how they might explain and justify the role of a coach to different stakeholders:

Group 1 – A senior leader in their service

Group 2 – A newly formed improvement team (starting QI work)

Group 3 – A patient representative

Each group should be made up of three to five people. You can duplicate groups (for example have two × Group 1, two × Group 2, two × Group 3) depending on the size of the group.

You should add some challenging questions from the stakeholders' perspective to get the groups thinking about how they might handle challenging conversations.

After 30 minutes, you should invite everyone back to the main room to present their findings. Each group has three to five minutes to present, including time for questions.

A template has been created to support this activity.

Example of template for activity 4.6.
Template available on Mural for session 4

Group 2

30 mins

TASK
Consider how you would explain the role of a QI Coach **to a newly formed improvement team**.
Think about the benefits the role brings, why is it is needed now, who and anticipate how you might respond to challenging questions. A few example challenging questions are provided - please add more and consider your response to each.

Explaining the QI Coach role to an improvement team

Responding to challenging questions from the QI project team

Will you be our project manager?

Can you help us by writing our patient leaflet and collecting data for us?

How are you different to shared governance?

Isn't QI just about loads of data?

Working with People

SESSION 5

Tasks you should undertake before the session

- Prepare the templates for the activities
- Review and tailor the slides to suit your organisation. Update the slide numbers in the table on the next page(s)
- Allocate a trainer to each section of the session
- Read the activity guide and prepare the activities
- Check that the handbook numbers indicated on the slides are correct (only applies if your Programme Leader has adapted or tailored the handbook)
- Share the slides with delegates beforehand (if applicable)
- Arrange timings for the All Teach, All Learn presentations
- Ensure all delegates are prepared for the All Teach, All Learn
- Review the teachback slides (at the end of the slide set) and amend topics, where needed.

Tasks the delegates should complete before the session

- Prepare for the All Teach, All Learn presentations for session 5
- Read the Patient Involvement section of the handbook.

Tasks you should undertake after the session

- Send out the session evaluation form and conduct a debrief with the faculty once delegates have responded (this can be done immediately after the session)
- Send out a reminder for the self-directed learning from the session and .CC in the mentors
- Share the slides with delegates (if applicable)
- Share the link to the Mural (or whichever platform you use) so delegates can access the activity content afterwards (if virtual)
- Store the All Teach, All Learn slide sets so delegates can download and use these for their future coaching role.

Learning outcomes for session 5

- Advocate for meaningful involvement in QI work and advise teams on methods for involvement
- Understand the importance of qualitative data in improvement work
- Consider the potential challenges in using PDSA cycles in QI work
- Recognise the role of a Quality Coach as an educator and practise teaching more advanced QI concepts.

Schedule

(A) indicates this topic has an in-classroom activity **(B) indicates this topic has a breakout room/small group activity**

More complex activities, particularly those in breakout rooms, have detailed explanation in the activity guide. The activity guide for session 5 is located below.

The timings for all sections with an activity include time for any teaching and/or explanations required, as well as the activity itself and any group reflection after completing the task.

Time	Topic	Activity	Slide numbers	Facilitator
9.00 → 9.15	Introduction to the day: • Housekeeping and agenda • Introduction to the facilitators • Programme aims and learning outcomes		1–9	Add who is delivering this section here
9.15 → 10.20	Coaching circle **(B)**	See activity 5.1 in the activity guide	10	
10.20 → 10.35	**Break**			
10.35 → 11.40	Involvement in QI • Today's learning outcomes • Ladder of participation • Force field analysis **(B)**	See activity 5.2 in the activity guide	12–30	
11.40 → 11.45	**Comfort break**			
11.45 → 12.15	Qualitative data	-	32–40	
12.15 → 1.00	**Lunch**			
1.00 → 1.30	Coaching PDSA	-	43–48	

Time	Topic	Activity	Slide numbers	Facilitator
1.30 → 2.45	All Teach, All Learn **(A)**	See activity 5.3 in the activity guide	49	
2.45 → 2.55	**Comfort break**			
2.55 → 3.50	All Teach, All Learn *continued*	–	51	
3.50 → 4.00	Close and self-directed learning • Recap of learning outcomes • Self-directed learning (teachback) • Additional reading • Feedback	–	52–55	

Activity Guide for session 5

Mural template

There are three activities for this session.

Activity		Template provided?	Breakout size	Duration	Group reflection*	Link
5.1	**Coaching circle**	No	5–8	60 mins	–	→
5.2	**Force field analysis – patient involvement in QI**	Yes	3–5	20 mins	5 mins	→
5.3	**All Teach, All Learn**	No	All	2 hrs 20 mins with break	–	→

***additional time to re-group, reflect and discuss breakout room activities**

Activity 5.1
Coaching circle

This is a repeat of the activity from session 2 – see activity 2.3 and further information in the slide set for session 2 for more details.

Group size should ideally be between five and eight. You should explain the format and principles of the coaching circle (using the slides and information in the handbook). It is important that everyone understands how these will run and that they are a recurrent activity in the programme. You may wish to identify those in the group that have a topic they would like to be coached on – this will help with setting up the breakout rooms.

As facilitators you may wish to join the rooms for the first run – to help field questions and to take on the role of timekeeper – so everyone else can focus on the activity itself.

Activity 5.2

Force field analysis–patient involvement in QI

The purpose of this activity is to consider what barriers we face in involving patients in QI. There should be a separate space for each breakout group to conduct the force field analysis.

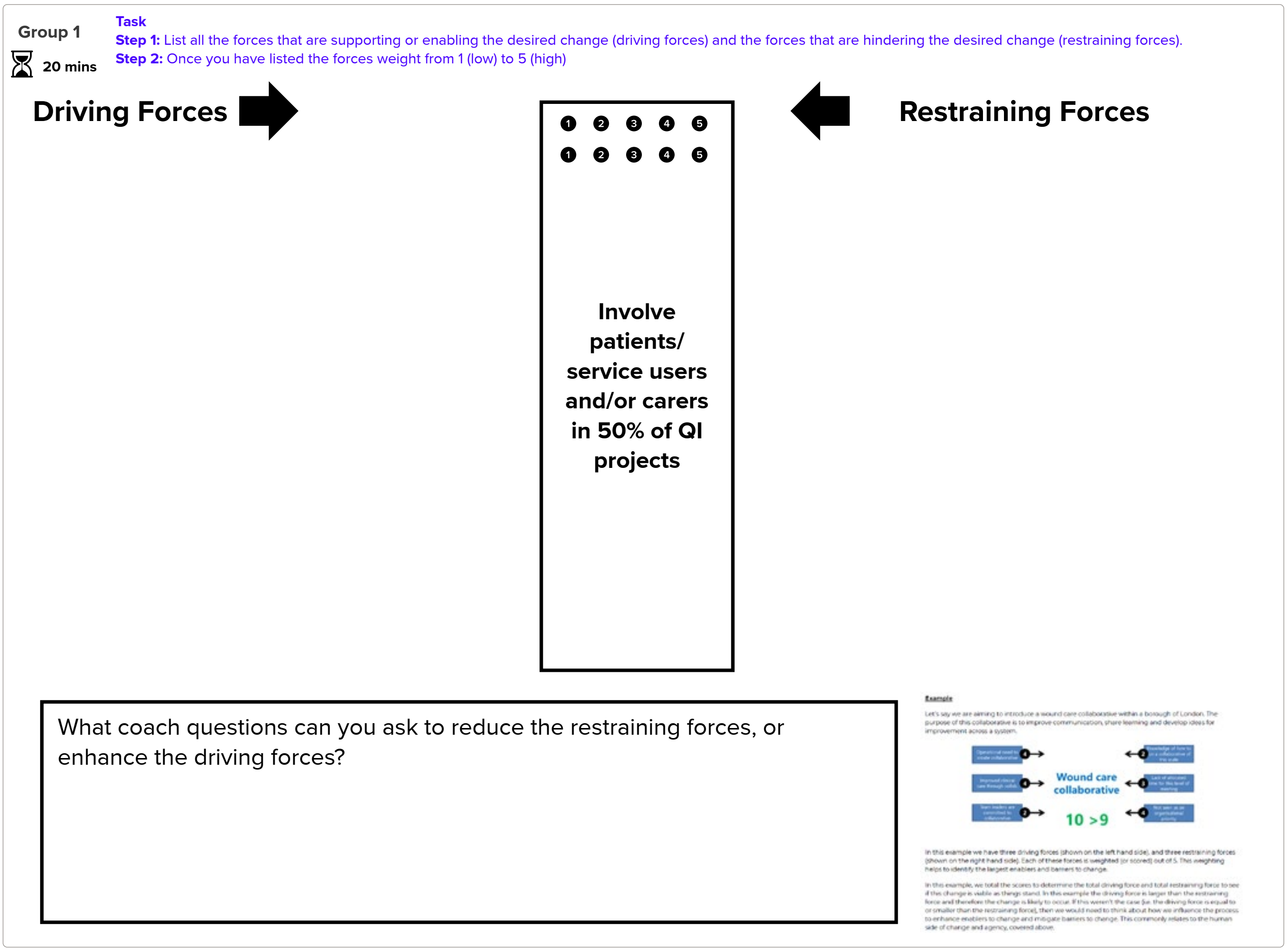
Example of template for activity 5.2.

Template available on Mural for session 5

There are three discrete tasks to this activity:

- Identify the driving and restraining forces for the given topic (e.g. involving patients in 80 % of QI projects) – you should change this to reflect a relevant challenge around patient involvement in your organisation
- Weight the forces using the numerical scale (1 equates to the least powerful forces, 5 to the most powerful forces)
- Consider how you would coach a team using this tool – thinking about next steps.

A simple example of a force field analysis is provided in the bottom right of each group's template.



Activity 5.3
All Teach, All Learn

All Teach, All Learn is an activity that focuses on developing skills as an independent and self-directed learner and educator in QI. For this activity, each delegate should prepare a 10–15 minute presentation on a QI tool that isn't taught as part of the programme, or in the teachback activities. Presentations are delivered by individuals and each delegate will normally have around four weeks to prepare for the session. The topics that each delegate teaches are either assigned by the faculty or selected from an extensive list of options.

Each delegate has 10–15 minutes to present on their selected topic. Their target audience should be either beginners to improvement or those currently undertaking improvement work. After each presentation there should be time for five minutes of Q&A and feedback. Questions from the faculty should focus on when and how this tool or concept is used in practice as a coach. You may also ask the presenter to explain the limitations of the tool if this isn't identified in the presentation itself.

Depending on group size, you may need to split the entire group in two or three, to ensure everyone has sufficient time to present and get feedback.

Coaching Measurement

SESSION 6

Tasks you should undertake before the session

- Prepare the templates for the activities
- Review and tailor the slides to suit your organisation. Update the slide numbers in the table on the next page(s)
- Allocate a trainer to each section of the session
- Read the activity guide and prepare the activities
- Check that the handbook numbers indicated on the slides are correct (only applies if your Programme Leader has adapted or tailored the handbook)
- Share the slides with delegates beforehand (if applicable)
- Send the group a reminder to read up on the teachback topics
- Update the teachback topics (if you changed them last time).

Tasks the delegates should complete before the session

- Find some data that is meaningful to them. This could be from a project they are working on, a project they are coaching or data from their team. They should analyse it and chart it
- Read up on the teachback topics in readiness for the session
- Read pages 164–179 in the Coaching Measurement chapter of the handbook.

Tasks you should undertake after the session

- Send out the session evaluation form and conduct a debrief with the faculty once delegates have responded (this can be done immediately after the session)
- Send out a reminder for the self-directed learning from the session and .CC in the mentors
- Share the slides with delegates (if applicable)
- Share the link to the Mural (or whichever platform you use) so delegates can access the activity content afterwards (if virtual).

Learning outcomes for session 6

- Coach a team to identify, collect and interpret data in support of their improvement work
- Apply creative problem-solving methods and behaviour change concepts to support teams to revive a stalled effort
- Understand your role as a 'connector' in supporting teams through measurement of improvement work
- Advocate for just enough data in QI work
- Recognise how Human Factors, bias and resistance can influence QI work.

Schedule

(A) indicates this topic has an in-classroom activity **(B) indicates this topic has a breakout room/small group activity**

More complex activities, particularly those in breakout rooms, have detailed explanation in the activity guide. The activity guide for session 6 is located below.

The timings for all sections with an activity include time for any teaching and/or explanations required, as well as the activity itself and any group reflection after completing the task.

Note: Coaching measurement topics have been separated out across sessions 6 and 7, in order to make the content more digestible and less 'heavy'. However, if you would prefer to cover all measurement topics in one day, you may wish to swap the second half of session 6 (Just enough data, Presenting data and Resistance to change) with the first half of session 7 (Coaching circle and SPC).

Time	Topic	Activity	Slide numbers	Facilitator
9.00 → 9.15	Introduction to the day: • Housekeeping and agenda • Introduction to the facilitators • Programme aims and learning outcomes • Today's learning outcomes		1–12	Add who is delivering this section here
9.15 → 9.50	Teachback **(B)**	See activity 6.1 in the activity guide	13–14	
9.50 → 10.30	Your experience with data **(B)**	See activity 6.2 in the activity guide	15	
10.30 → 10.45	**Break**			
10.45 → 12.00	Coaching measurement • Drivers for disengagement in data and measurement **(B)** • 3 types of measurement • Key aspects of measurement in QI	See activity 6.3 in the activity guide	17–24	
12.00 → 12.45	**Lunch**			
12.45 → 1.30	Just enough data • Case study from IHI • Activity (shopping list) **(B)**	See activity 6.4 in the activity guide	26–37	
1.30 → 1.55	Presenting data	-	38–45	
1.55 → 2.00	**Comfort break**			

Time	Topic	Activity	Slide numbers	Facilitator
2.00 → 2.30	Resistance to change • Maurer's 3 levels of resistance • Coaching resistance **(B)**	See activity 6.5 in the activity guide	47–52	
2.30 → 2.45	**Break**			
2.45 → 3.50	Human factors and bias	–	54–68	
3.50 → 4.00	Close and self-directed learning • Recap of learning outcomes • Self-directed learning • Additional reading • Feedback	–	69–72	

Session 6

Activity Guide for session 6

Mural template

There are five activities for this session.

Activity		Template provided?	Breakout size	Duration	Group reflection*	Link
6.1	**Teachback**	No	3–5	45 mins	–	→
6.2	**Your experience with data**	No	3–5	40 mins	–	→
6.3	**Drivers for disengagement in data and strategies to address this**	Yes	3–5	20 mins	10 mins	→
6.4	**Just enough data**	Yes	3–5	25 mins	–	→
6.5	**Coaching resistance**	Yes	3, 6 or 9 groups	10 mins	15 mins	→

***additional time to re-group, reflect and discuss breakout room activities**

Activity 6.1
Teachback

This is a repeat of the activity from session 3 – see activity 3.1 and further information in the slide set for session 3 for more details.

Teachback aims to 'flip the classroom', by asking delegates to have a go at teaching their peers on a basic QI concept or tool. The purpose of this activity is to provide a safe learning space for delegates to practise the idea of 'Just-in-Time' learning. There are added benefits – such as enabling the group to 'top-up' QI knowledge as their peers teach them about a QI tool/concept. Additionally, it allows the group to build up their 'QI toolbox' by perhaps saving a copy of a good presentation or providing ideas for how they might present a specific topic to a team they are coaching.

In this task, you should create three to six breakout groups of (ideally) between two to four people. Suggested topics are provided on the slides – feel free to change these (note that if you do, you will need to change the slide at the end of session 2 as well as this is set as homework). Each group should be assigned a topic at random. They have ten minutes to prepare a quick presentation to bring back to the main room. They should pitch the topic to someone who is a QI beginner. The teaching should last no more than five minutes, with an additional two minutes for Q&A after. Each group should have time to present so adjust timings accordingly for large groups. The group can use existing content to help with the teaching (for example, images from google).

Teachback is used a few times throughout the programme. Please ensure different topics are covered each time.

Activity 6.2
Your experience with data

Self-directed learning from the previous session asked all delegates to identify a dataset familiar to them (e.g. from a project they are working on/have worked on, service data or from the project they are coaching).

They should discuss in groups of three to five how confident they feel with data and measurement for improvement (out of 10). What makes them say this? The purpose of the activity is to help delegates understand their own maturity to measuring for QI.

They should then share the data they worked on as part of the self-directed task, discussing their successes and challenges.

If one or more delegate is willing, they could showcase their approach, explaining how they analysed, collated and presented the data.

Activity 6.3

Drivers for disengagement in data and strategies to address this

People can often be disengaged and/or disinterested in data and measurement. A coach may often need to influence people to engage with the process of measurement for improvement. This activity asks delegates to consider the causes or reasons to disengage with measurement, and then identify potential strategies to address these.

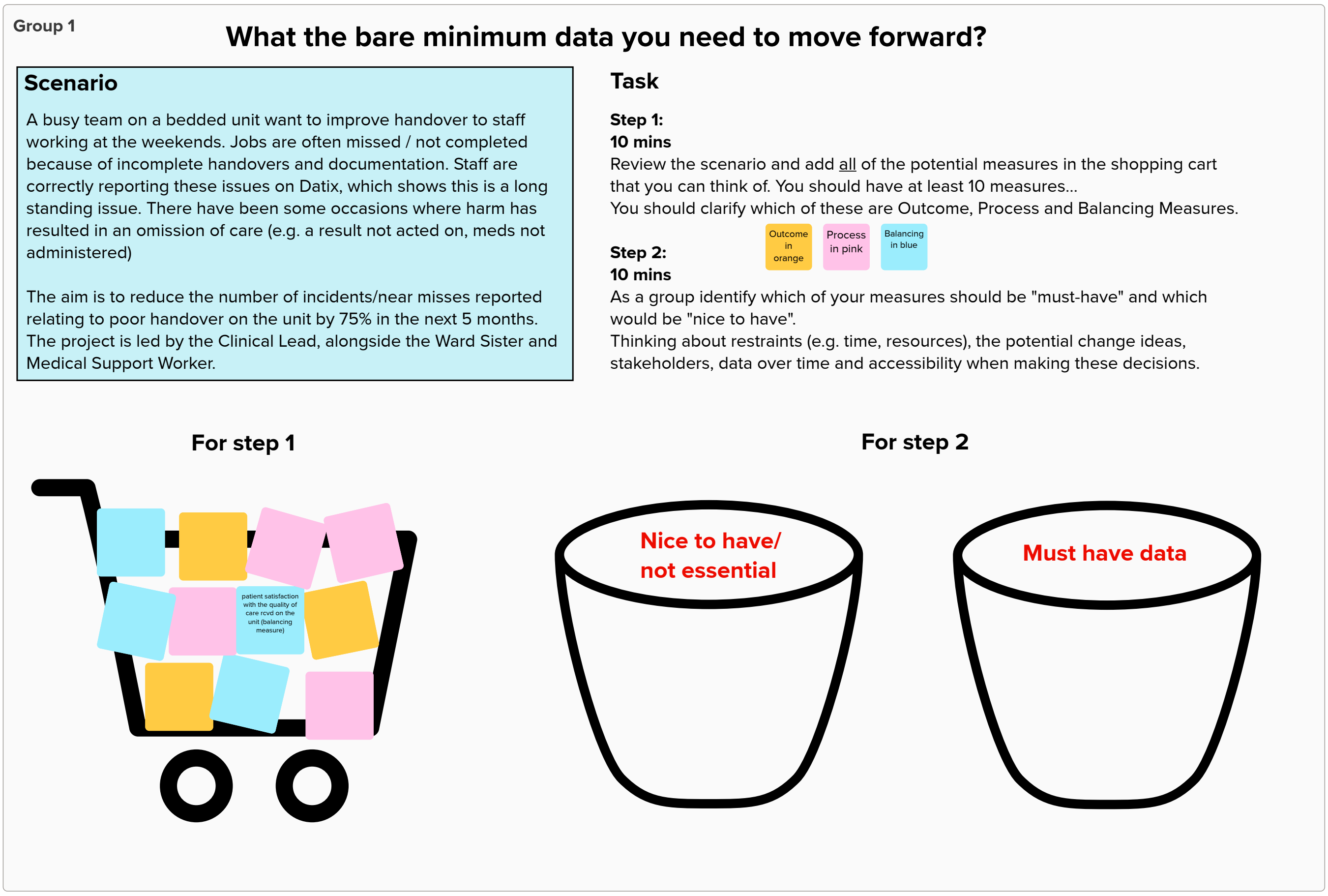
Example of template for activity 6.3.
Template available on Mural for session 6

Session 6

Activity 6.4

Just enough data

The purpose of this activity is to encourage a pragmatic outlook for all coaches. It can be tempting to select a broad range of measures, especially for those who are data lovers, or more inexperienced in data and slightly risk averse. Conversely, for those that dislike data, it can be tempting to neglect data entirely or only have one measure. Please amend the scenario, if needed.



Example of template for activity 6.4.
Template available on Mural for session 4

Activity 6.5
Coaching resistance

This activity encourages delegates to look at how they can help teams to work with resistance. You should split the group into three (or six, or nine) groups. Each group should look at one of Maurer's three levels of resistance ('I don't get it', 'I don't like it' or 'I don't like you').

They should spend ten minutes discussing any key thoughts. They should then share a summary of their thoughts with the wider group to ensure all three levels are discussed.

Group 1 - resistance

As a coach you will inevitably work with teams who face resistance. Using Maurer's 3 levels, consider your role as a coach in supporting teams to address resistance. You should focus on level 1 I don't get it

Consider:

- **what coaching questions might you ask a team to explore this type of resistance?**
- **what strategies could teams use to overcome the given type of resistance?**

Human Side of Change

SESSION 7

Note: Session 7 content is deemed 'supplementary'. Please see the Programme Leader Guide for more information on 'core' and 'supplementary' content.

Tasks you should undertake before the session

- Prepare the templates for the activities
- Review and tailor the slides to suit your organisation. Update the slide numbers in the table on the next page(s)
- Allocate a trainer to each section of the session
- Read the activity guide and prepare the activities
- Check that the handbook numbers indicated on the slides are correct (only applies if your Programme Leader has adapted or tailored the handbook)
- Share the slides with delegates beforehand (if applicable)
- Review the teachback topics (at the end of the slidesets) and amend, if needed.

Tasks the delegates should complete before the session

- Read the SPC Charts section of the handbook (page 185)
- Read the Brand Thinking section of the handbook (page 235)
- Read the Designing Sustainable Change section of the handbook (page 220).

Tasks you should undertake after the session

- Send out the session evaluation form and conduct a debrief with the faculty once delegates have responded (this can be done immediately after the session)
- Send out a reminder for the self-directed learning from the session and .CC in the mentors
- Share the slides with delegates (if applicable)
- Share the link to the Mural (or whichever platform you use) so delegates can access the activity content afterwards (if virtual).

Learning outcomes for session 7

- Be able to coach a team to identify collect and interpret data to support their improvement project
- Be able to apply creative problem-solving methods and behaviour change concepts to support teams to revive a stalled effort
- Be able to explain the key concepts of SPC charts and be able to use them to support improvement work.

Schedule

(A) indicates this topic has an in-classroom activity **(B) indicates this topic has a breakout room/small group activity**

More complex activities, particularly those in breakout rooms, have detailed explanation in the activity guide. The activity guide for session 7 is located below.

The timings for all sections with an activity include time for any teaching and/or explanations required, as well as the activity itself and any group reflection after completing the task.

Note: Coaching measurement topics have been separated out across sessions 6 and 7, in order to make the content more digestible and less 'heavy'. However, if you would prefer to cover all measurement topics in one day, you may wish to swap the second half of session 6 (Just enough data, Presenting data and Resistance to change) with the first half of session 7 (Coaching circle and SPC), so that SPC is included as part of session 6.

Time	Topic	Activity	Slide numbers	Facilitator
9.00 → 9.15	Introduction to the day: • Housekeeping and agenda • Introduction to the facilitators • Programme aims and learning outcomes • Today's learning outcomes		1–11	Add who is delivering this section here
9.15 → 10.15	Coaching circle **(B)**	See activity 7.1 in the activity guide	12	
10.15 → 10.25	**Comfort break**			
10.25 → 11.00	SPC • The anatomy of an SPC • 3 sigma • Introduction to Making Data Count SPC tool (Demo part 1) **(A)** • Variation and rules for special cause in SPC	See activity 7.2 in the activity guide	13–29	
11.00 → 11.05	**Comfort break**			
11.05 → 11.25	SPC *continued* • Spot the special cause activity • SPC tool (continued demo) **(A)**	Poll on which type of special cause is present for the given charts See activity 7.3 in the activity guide	31–37	
11.25 → 12.15	SPC activity **(B)**	See activity 7.4 in the activity guide	38–39	
12.15 → 1.00	**Lunch**			

Time	Topic	Activity	Slide numbers	Facilitator
1.00 → 1.20	Icebreaker 'QI bingo' or otherwise **(A)**	See activity 7.5 in the activity guide	41–42	
1.20 → 2.20	Brand thinking **(Aor B)**	See activity 7.6 in the activity guide	43–47	
2.20 → 2.30	**Break**			
2.30 → 3.30	Sustainable change **(B)** • Hierarchy of Intervention Effectiveness • Hawthorne	See activity 7.7 in the activity guide	49–62	
3.30 → 4.00	Catch up presentations (All Teach, All Learn) **(A)** *Use this slot to catch up on any presentations that did not take place in session 6 (e.g. because of leave/ sickness etc.)*	See activity 5.3 in activity guide	63	
4.00	Close and self-directed learning • Recap of learning outcomes • Self-directed learning • Additional reading • Feedback	-	64–67	

Activity Guide for session 7

Mural template

There are seven activities for this session.

Activity		Template provided?	Breakout size	Duration	Group reflection*	Link
7.1	**Coaching circle**	No	5–8	60 mins	–	→
7.2	**SPC demo (part 1)**	Excel SPC tool	All	10 mins	–	→
7.3	**SPC demo (part 2)**	Excel SPC tool	All	10 mins	–	→
7.4	**SPC activity**	Yes	3–5	40 mins	10 mins	→
7.5	**Icebreaker (QI Bingo)**	No	All	15 mins	–	→
7.6	**Brand thinking**	Yes	All or large groups	50 mins	–	→
7.7	**Hierarchy of Intervention Effectiveness**	Yes	3–5	10 mins	–	→
7.8	**Catch-up presentations (All Teach, All Learn)**	No	All	30 mins	–	

***additional time to re-group, reflect and discuss breakout room activities**

Activity 7.1
Coaching circle

This is a repeat of the activity from session 2 – see activity 2.3 and further information in the slide set for session 2 for more details.

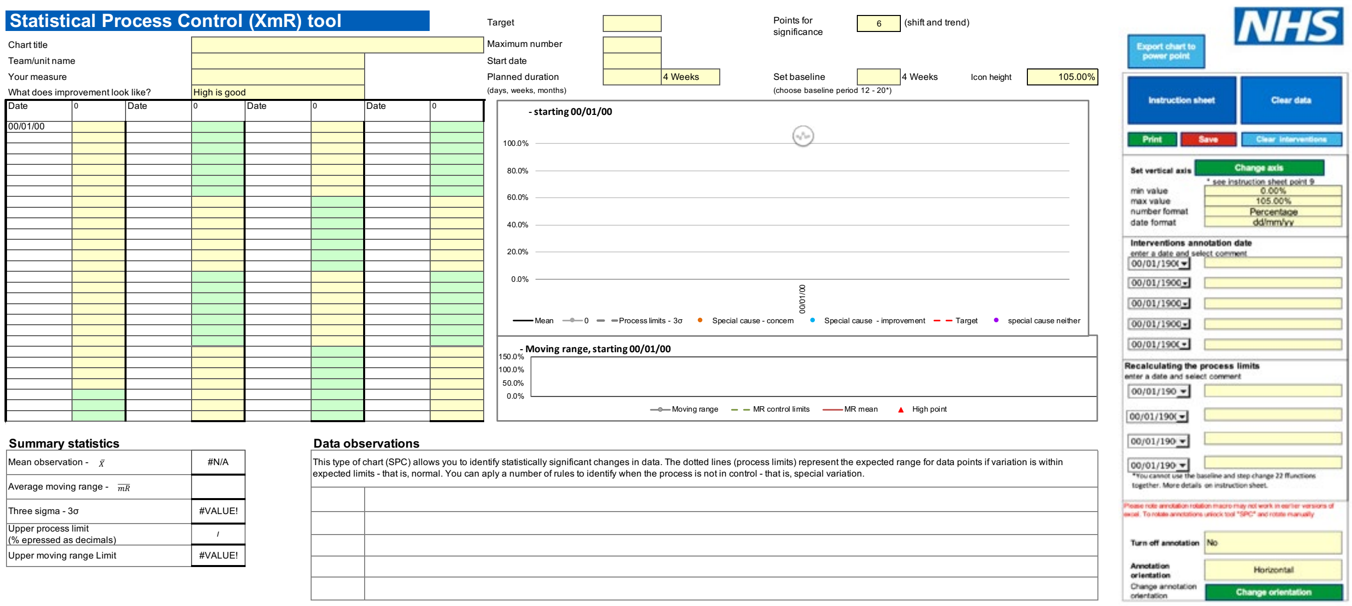
Group size should ideally be between five and eight. You should explain the format and principles of the coaching circle (using the slides and information in the handbook). It is important that everyone understands how these will run and that they are a recurrent activity in the programme. You may wish to identify those in the group that have a topic they would like to be coached on – this will help with setting up the breakout rooms.

As facilitators you may wish to join the rooms for the first run – to help field questions and to take on the role of timekeeper – so everyone else can focus on the activity itself.

Activity 7.2
SPC demo (part 1)

Please see this link to download the SPC tool from NHS England:
www.england.nhs.uk/statistical-process-control-tool/

The website also provides a description of how to use this tool, including a YouTube video.



The purpose of this activity is to demonstrate how to use the tool.

For this activity, you should demo the tool (screen sharing or on a large screen if F2F).

- How to access the tool (NHS website or NHS Future platform)
- Navigating the tool
- Using the different tabs
- Understanding the page with the data entry and chart explaining the title sections, team details, dates
- You should enter details for these 'title' sections in readiness for the part 2 demo. We have provided example data you can use on Lewis Hamilton F1 career positions – please feel free to change this.

Encourage the delegates to 'follow along' with you by downloading and filling in details on the Excel template as you do it as well.

Session 7

Activity 7.3
SPC demo (part 2)

Using the same tool as the above activity, please now add in the data below (or use your own data). Complete all sections as appropriate and then show the completed SPC chart. Interpret the chart and explain how useful this template is.

Again, encourage delegates to follow along with you on their own laptop/device as you are doing it.

Chart title	Lewis Hamilton Race Positions
Team/unit name	Mercedes
Your measure	Race position
What does improvement look like?	Low is good

Date	Race position	Date	Race position	Date	Race position
17/03/19	2.0	12/04/20	3.0	12/04/20	
31/03/19	1.0	31/03/19	1.0	31/03/19	
14/04/19	1.0	14/04/19	1.0	14/04/19	
28/04/19	2.0	28/04/19	1.0	28/04/19	
12/05/19	1.0	12/05/19	21.0	12/05/19	
26/05/19	1.0	26/05/19	3.0	26/05/19	
09/06/19	1.0	09/06/19	1.0	09/06/19	
23/06/19	1.0	23/06/19	1.0	23/06/19	
07/07/19	5.0	07/07/19	2.0	07/07/19	
21/07/19	1.0	21/07/19	1.0	21/07/19	
04/08/19	2.0	04/08/19	1.0	04/08/19	
18/08/19	3.0	18/08/19	7.0	18/08/19	
01/09/19	4.0	01/09/19	15.0	01/09/19	
15/09/19	1.0	15/09/19	2.0	15/09/19	
29/09/19	3.0	29/09/19	2.0	29/09/19	
13/10/19	1.0	13/10/19	4.0	13/10/19	
27/10/19	2.0	27/10/19	1.0	27/10/19	
10/11/19	7.0	10/11/19	1.0	10/11/19	
24/11/19	1.0	24/11/19	9.0	24/11/19	
08/12/19	4.0	08/12/19	2.0	08/12/19	
22/12/19	1.0	22/12/19	1.0	22/12/19	
05/01/20	1.0	05/01/20	1.0	05/01/20	
19/01/20	1.0	19/01/20		19/01/20	
02/02/20	2.0	02/02/20		02/02/20	
16/02/20	1.0	16/02/20		16/02/20	
01/03/20	1.0	01/03/20		01/03/20	
15/03/20	7.0	15/03/20		15/03/20	
29/03/20	1.0	29/03/20		29/03/20	

Activity 7.4
SPC activity

The purpose of this activity is to provide delegates with an opportunity to practise using the SPC tool.

Each group is given a raw dataset for fabricated QI work – either an outcome, process and balancing measure. These can be found in the Training Resource Pack.

Each group should:

- Manipulate the data as required in order to enable them to plot it on an SPC chart. This will require them to pivot the data and so you may need to join to help groups with this if needed
- Plot the data on the NHS England template (which they can access via the link used in the prior activity)
- Review the chart – is there any special cause present? If so, which?
- Prepare a brief presentation on the data (this doesn't require slides, just the key points they'd like to make) as if they were an analyst presenting the dataset back to the QI team, considering:
  - What the special cause may mean
  - What coaching questions might the coach ask the team to take the work forward?

Activity 7.5
Icebreaker (bingo)

This activity is primarily an icebreaker and a bit of fun. However, it also aims to strengthen the groups' knowledge of QI concepts and history.

An example grid is shown below.

If F2F, ask the group to mingle and see who can complete either a) a row, diagonal or column or b) the whole grid, as quickly as possible. They need to ask others to help them fill in the box without looking up the answers on Google. This may take around ten minutes.

If virtual, you will need to move people between breakout rooms of two to three people every minute or so. This should enable them to complete the row/diagonal/column or grid.

Example bingo grid for activity 7.5. Template available on Mural for session 7. Answers are on the next page.

QI BINGO

What are the 3 components of Juran's Trilogy **AND** What is Juran's first name? 1. 2. 3. First Name	What is the centre line on an SPC called and how do you calculate it?	What is the name of the intermediate QI course at CLCH?	According to Ron Heifetz, what are the two types of change? It begins with a T It begins with an A
What are the 3 aspects of context that one must consider when leading QI? 1. M________ 2. M________ 3.	When would you use nominal group technique?	What is the name of the book that introduced the Model for Improvement?	What is 1 more rule to identify special cause in an SPC chart? (not including astronomical point, shift, and trend)
What is the final stage of the 6 stages of a qi project?	What are the two sides of a force field analysis and what might you use force field analysis for?	What is the core rule of a Pareto chart?	Who said: *"every system is perfectly designed to get the results it gets"*?
What are the 3 common rules for special cause in a run chart? Rules 1. 2. 3.	Who originally said "Everyone has two jobs: to do their work and to improve their work"?	What is the IHI triple aim?	What are the 3 As of PDSA? A's 1. 2. 3.

QI BINGO

What are the 3 components of Juran's Trilogy **AND** What is Juran's first name? Quality planning, quality control (sometimes includes quality assurance) and quality improvement Joseph First Name	What is the centre line on an SPC called and how do you calculate it? Mean add up all the values and divide by the no of values	What is the name of the intermediate QI course at CLCH? QI Practitioner	According to Ron Heifetz, what are the two types of change? It begins with a T Technical It begins with an A Adaptive
What are the 3 aspects of context that one must consider when leading QI? Microsystem macrosystem environment	When would you use nominal group technique? ideation - generating and selecting ideas	What is the name of the book that introduced the Model for Improvement? The Improvement Guide by Langley et al	What is 1 more rule to identify special cause in an SPC chart? (not including astronomical point, shift, and trend) the outer third rule
What is the final stage of the 6 stages of a qi project? Sustain and spread	What are the two sides of a force field analysis and what might you use force field analysis for? Driving forces and restraining forces	What is the core rule of a Pareto chart? 80/20	Who said: *"every system is perfectly designed to get the results it gets"*? Deming
What are the 3 common rules for special cause in a run chart? Rules 1. Shift, trend, astronomical point	Who originally said "Everyone has two jobs: to do their work and to improve their work"? Paul Batalden	What is the IHI triple aim? • Improving the patient experience of care (including quality and satisfaction); • Improving the health of populations; and • Reducing the per capita cost of health care.	What are the 3 As of PDSA? A's 1. 2. 3. Adopt, Adapt, Abandon

Activity 7.6
Brand Thinking

The purpose of this activity is to introduce a useful tool to coaches, who may then use this with teams to support creative thinking.

This activity is based on the tool outlined in the Creative Approaches for Problem Solving[16] toolkit from the Q Community.

The activity can be done with the whole group or in groups of five to ten people.

You should use the steps of Brand Thinking to help teams to explore a defined problem. First, clearly define the problem or task to tackle. You may choose this beforehand or ask the group to agree on a problem or task focus. We've suggested 'how do we make QI go viral in our Trust?'.

Next, choose an innovative brand – spend up to three minutes on this. You may choose a brand in advance or offer several to the group for them to pick, for example IKEA, M&S, McDonalds, Apple, Google, Amazon, John Lewis etc. Individuals should then brainstorm words to describe the brand (up to five minutes).

Then, using the template below:

1. Each individual should share their descriptions with the wider group, in order to create a collated list of descriptor words and phrases (up to ten minutes)
2. The group should then spend up to ten minutes thinking about how their chosen brand would approach the problem. What would they do differently? What innovative ideas might they come up with?
3. Finally, spend up to ten minutes reflecting on which of these new ideas might be useful to take forward.

After the allotted time, each group should be brought back to feed back their ideas – encourage playful and fun ideas whilst also asking for solutions to the problem.

Example of template for activity 7.6.
Template available on Mural for session 7

16 https://q.health.org.uk/resource/creative-approaches-to-problem-solving/

Activity 7.7
Hierarchy of Intervention Effectiveness

This activity provides an opportunity for delegates to apply the Hierarchy of Intervention Effectiveness to real improvement work. This tool can be a helpful challenge to teams around the sustainability of their change ideas. Coaches may find this a useful tool to share with the teams they support.

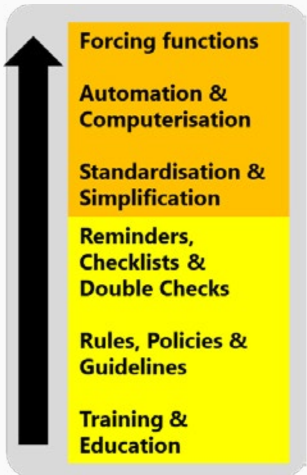
The activity should be done in small groups (3–5 people) and lasts around 10 minutes. An individual in the group should identify improvement work that they have worked on and map their change ideas onto the hierarchy. The challenge from their peers should then be around how they can shift ideas to more system-focused changed.

There is a template provided, which is suitable for virtual and face to face delivery.

Example of template for activity 7.6.

Group 1

Task: Identify QI work that one of you have worked on. Consider the changes and PDSAs that were tested / implemented. Where do they fall on the hierarchy? (below)
How might you shift the ideas to more system-focused change?



Template available on Mural for session 7

Human Side of Change

SESSION 8

Note: Session 8 content is deemed 'supplementary'. Please see the Programme Leader Guide for more information on 'core' and 'supplementary' content.

Tasks you should undertake before the session

- Prepare the templates for the activities
- Review and tailor the slides to suit your organisation. Update the slide numbers in the table on the next page(s)
- Allocate a trainer to each section of the session
- Read the activity guide and prepare the activities
- Check that the handbook numbers indicated on the slides are correct (only applies if your Programme Leader has adapted or tailored the handbook)
- Share the slides with delegates beforehand (if applicable)
- Update the teachback topics (if you changed them last time).

Tasks the delegates should complete before the session

- Read the COM-B and the behaviour change wheel sections of the handbook (page 204)
- Read the IHI Change Concepts section of the handbook (page 232)
- Read the Reverse Brainstorming section of the handbook (page 231).

Tasks you should undertake after the session

- Send out the session evaluation form and conduct a debrief with the faculty once delegates have responded (this can be done immediately after the session)
- Send out a reminder for the self-directed learning from the session and .CC in the mentors
- Share the slides with delegates (if applicable)
- Share the link to the Mural (or whichever platform you use) so delegates can access the activity content afterwards (if virtual).

Learning outcomes for session 8

- Be able to apply creative problem-solving methods and behaviour change concepts to support teams to revive a stalled effort
- Understand and be able to apply COM-B and the behaviour change wheel to support QI work
- Be able to use a convergent thinking tool to facilitate an improvement workshop
- Understand the IHI change concepts and how they can be used to inspire improvement work.

Schedule

(A) indicates this topic has an in-classroom activity **(B) indicates this topic has a breakout room/small group activity**

More complex activities, particularly those in breakout rooms, have detailed explanation in the activity guide. The activity guide for session 8 is located below.

The timings for all sections with an activity include time for any teaching and/or explanations required, as well as the activity itself and any group reflection after completing the task.

Time	Topic	Activity	Slide numbers	Facilitator
9.00 → 9.15	Introduction to the day: • Housekeeping and agenda • Introduction to the facilitators • Programme aims and learning outcomes • Today's learning outcomes		1–11	Add who is delivering this section here
9.15 → 10.00	Teachback **(B)**	See activity 8.1 in the activity guide	12–13	
10.00 → 10.05	**Comfort break**			
10.05 → 11.00	COM-B and the behaviour change wheel	-	15–29	
11.00 → 11.15	**Coffee break**			
11.15 → 11.55	COM-B activity **(B)**	See activity 8.2	31–32	
11.55 → 12.00	COM-B further reading	-	33–34	
12.00 → 12.45	**Lunch**			
12.45 → 1.15	Graduation drawings **(A)**	See activity 8.3	36–37	
1.15 → 1.45	IHI change concepts activity **(B)**	See activity 8.4	38–41	
1.45 → 1.55	**Comfort break**			

Time	Topic	Activity	Slide numbers	Facilitator
1.55 → 2.45	Reverse brainstorming **(A)**	See activity 8.5	43–47	
2.45 → 3.30	Convergent thinking **(A)**	See activity 8.6	48–56	
3.30 → 4.00	What's next for you as a coach	-	57–61	
4.00	Close and self-directed learning • Recap of learning outcomes • Feedback	-	62–63	

Activity Guide for session 8

Mural template

There are six activities for this session.

Session 8

Activity		Template provided?	Breakout size	Duration	Group reflection*	Link
8.1	**Teachback**	No	3–5	45 mins	–	→
8.2	**COM-B activity**	Yes	3–5	45 mins	5 mins	→
8.3	**Graduation drawings**	Yes	All	30 mins	–	→
8.4	**IHI change concepts**	Yes	3–5	15 mins	5 mins	→
8.5	**Reverse brainstorming**	Yes	All or large groups	15 mins	15 mins	→
8.6	**Convergent thinking**	Yes	All or large groups	20 mins	10 mins	→

***additional time to re-group, reflect and discuss breakout room activities**

Activity 8.1
Teachback

This is a repeat of the activity from session 3 – see activity 3.1 and further information in the slide set for session 3 for more details.

Teachback aims to 'flip the classroom', by asking delegates to have a go at teaching their peers on a basic QI concept or tool. The purpose of this activity is to provide a safe learning space for delegates to practise the idea of 'Just-in-Time' learning. There are added benefits – such as enabling the group to 'top-up' QI knowledge as their peers teach them about a QI tool/concept. Additionally, it allows the group to build up their 'QI toolbox' by perhaps saving a copy of a good presentation or providing ideas for how they might present a specific topic to a team they are coaching.

In this task, you should create three to six breakout groups of (ideally) between two to four people. Suggested topics are provided on the slides – feel free to change these (note that if you do, you will need to change the slide at the end of session 2 as well as this is set as homework). Each group should be assigned a topic at random. They have ten minutes to prepare a quick presentation to bring back to the main room. They should pitch the topic to someone who is a QI beginner. The teaching should last no more than five minutes, with an additional two minutes for Q&A after. Each group should have time to present so adjust timings accordingly for large groups. The group can use existing content to help with the teaching (for example, images from google).

Teachback is used a few times throughout the programme. Please ensure different topics are covered each time.

Session 8

Activity 8.2
COM-B

The purpose of this activity is for delegates to experience the application of COM-B and the behaviour change wheel.

The activity is completed in two parts:

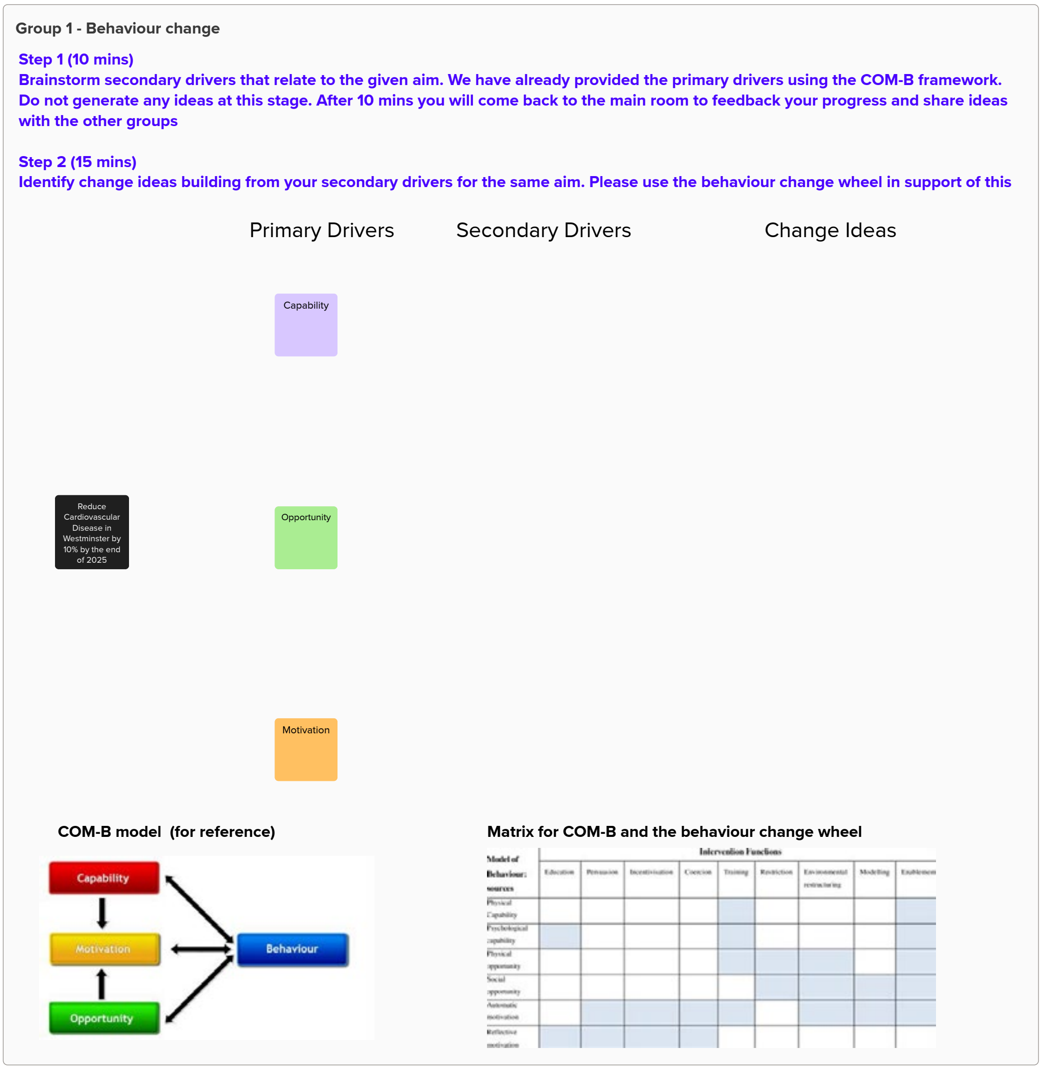
1. Identifying secondary drivers
2. Identifying change ideas.

In the first part, groups are tasked with identifying secondary drivers for a given aim. In the template provided we have used 'Reduce Cardiovascular Disease in Westminster by 10 % by the end of 2025'.

The primary drivers are capability, opportunity and motivation. The groups have around ten minutes to brainstorm appropriate secondary drivers. All groups should then feed back to the main room for up to ten minutes, in order to cross-pollinate drivers and approaches to the task.

In the second part, groups are asked to identify the change ideas that reflect their drivers for the same aim. They must use the behaviour change wheel in support of this. The groups have 15 minutes to brainstorm their ideas. Groups should then present back to the main room

Example of template for activity 8.2.
Template available on Mural for session 8

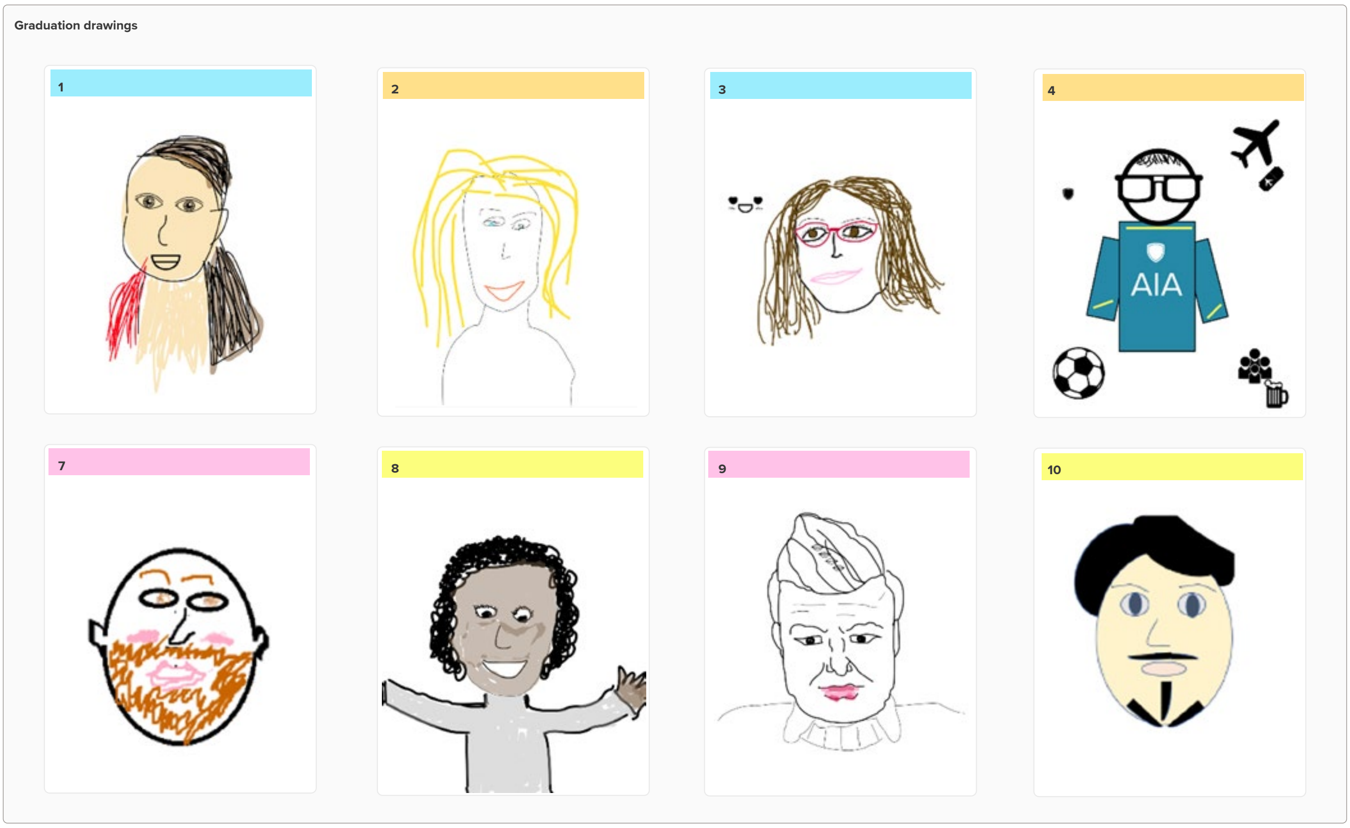


Activity 8.3
Graduation drawings

This activity is an icebreaker. The drawings from this activity can be used in a form of 'graduation' after the programme, depending on how formal it is.

This activity asks each delegate to 'draw' another person from the programme. If virtual you can use an online tool such as Mural to enable delegates to draw with the online pencil. You may need to enable 'large gallery' or similar so that everyone can see one another on the screen.

If in person, they can use crayons, pens etc. and sit opposite one another. Each person has a maximum of 15 minutes to draw their allocated person.



Activity 8.4
IHI change concepts

This task uses the IHI change concepts worksheet.[17] An IHI log in is required (this is free to create).

This task aims to familiarise delegates with change concepts, and how they can be used in support of creative thinking and the generation of change ideas.

Ask each delegate to consider QI work they are involved in and use the change concepts to help them identify a new idea for improvement. They should discuss these with their peers in small groups and scrutinise and challenge one another on these ideas. How can they be bettered?

17 https://www.ihi.org/resources/_layouts/download.aspx?SourceURL=%2fresources%2fKnowledge+Center+Assets%2fTools+-+QualityImprovementProjectChangeConceptsWorksheet_c8af5542-2cb3-467f-a7ac-11000709eed8%2fIHITool_QIProjectChangeConceptsWorksheet.pdf

Activity 8.5

Reverse brainstorming

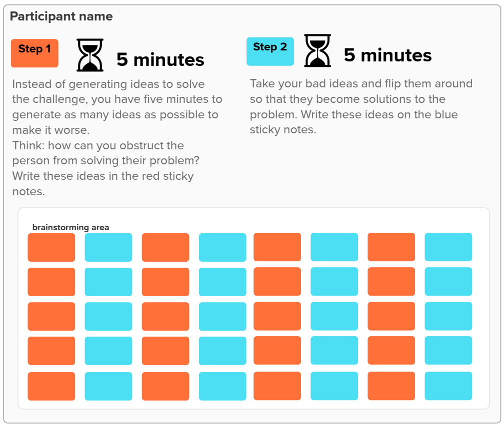
The purpose of this activity is to introduce and experience a simple activity to support creative thinking.

The task has three stages:

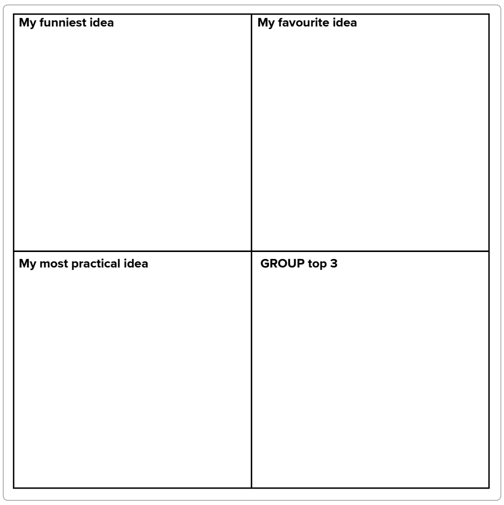
1. Instead of generating ideas to solve the challenge, delegates have five minutes to generate as many ideas as possible to make it worse. They should think: how can one obstruct someone from solving the given problem? In the template they should write these ideas on the red sticky notes (as many as possible). In our scenario we used the challenge of graffiti on a street. This takes around five minutes.
2. Take the bad ideas and flip them around so that they become solutions to the problem. In the template they can write these ideas on the blue sticky notes. This takes a further five minutes.
3. Group discussion:
   - Take five minutes to peruse the other ideas (virtually or around the room).
   - What is the funniest idea? (Each add to template)
   - What is your favourite idea?
   - What is the most practical idea?
   - Vote on top three in the group.

You can also include an extender activity reflecting on this creative thinking tool. It can be used for other tools in the programme as well.

Individual work area (part 1 and 2)

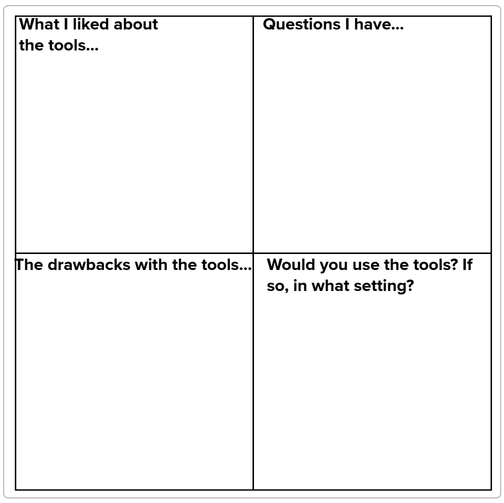


Group work area (part 3)



Example of template for activity 8.5.
Template available on Mural for session 8

Example of template for extender activity for activity 8.5.
Template available on Mural for session 8



Activity 8.6
Convergent thinking

Building on the work from the prior activity, delegates should use pairwise comparison and/or a prioritisation matrix to help them converge the ideas generated and select the first idea to test.

Delegates should be given a blank space to work with – to reflect the situation they will find themselves in when working with teams.

Group discussion after the activity to reflect on their experience.

Part 3

Frequently Asked Questions

Frequently Asked Questions

Please see the Programme Leader Guide for full details on how to deliver this programme.

1. *At what level of QI do I need to be to teach on the coach programme?*

This programme has been written to support a faculty with a diverse range of experiences in improvement. You do not need to be an expert in quality improvement to teach the content on the programme. Instead, you should bring your experiences of supporting people through change (such as QI) and teach the subjects you are most confident in.

The programme brings together subjects from fields such as improvement, coaching, group dynamics, organisational development, human factors, Liberating Structures, design and measurement. You will undoubtedly have good experience in some of these fields.

Given the content has been written by someone other than yourself, we have tried to make it as easy as possible to 'pick up' the content and teach. Slides have full notes and the Trainer Guide explains how to run activities in comprehensive detail.

2. *Ideally, how many delegates should we have in a cohort of the training?*

From our experience a cohort size of between 10–30 people is recommended. This ensures a good return on investment whilst providing a positive and manageable learning environment.

3. *How many facilitators do we need to deliver the content per session?*

Two facilitators is enough to deliver each session. The activities have been designed to be self-facilitated, making the content easier to teach and less demanding on the facilitators. It is possible to deliver the content alone, but we do not recommend this. Having two facilitators will also ensure a more diverse range of experience, make running the sessions more straightforward, and mean sessions do not have to be rescheduled if one facilitator is unwell or otherwise unable to attend. You may decide to have the same two people deliver all of the content, or use a wider faculty to deliver the sessions or parts of the sessions, perhaps owing to each individual's subject matter expertise.

4. *Will the slides be provided or do I have to write my own?*

The slides (and other content such as supplementary materials) are available to download as part of the Training Resource Pack.

5. *How much out-of-course time do I need to dedicate to the programme?*

This depends on how confident you are in the subject(s) you are teaching. A general rule of thumb when preparing for a teaching session on this programme is to spend the equivalent amount of time preparing as you would do teaching the content. This means you may need to spend up to a day beforehand getting ready, by:

- Reviewing the slides and slide notes to see how much you need to read up on (if at all) and how much needs amendment
- Meeting with any co-facilitators to discuss the session
- Adapting or tailoring the slides to suit your teaching style
- Adding in slides using your own examples
- Preparing the activities (e.g. creating templates, preparing resources)
- Preparing supplementary resources (e.g. links, handouts, feedback forms)

Each individual is different; you may need more or less time than this.

6. *Do I have to teach on every week or can I select which weeks to teach?*

Your Programme Leader should work with the programme faculty in order to decide who will deliver the content of each session.

We recommend that the sessions are delivered fortnightly (or thereabouts allowing for half term and other breaks). Delivering the content in this way allows to the coach to learn concepts at the pace that QI work tends to develop (e.g. they learn about measurement before the team start to consider measurement).

An additional benefit of delivering the content fortnightly is that it affords delegates the time they need to complete self-directed learning and meet with teams to practise coaching.

However the programme has been designed to be flexible, and can be delivered at a pace that suits your organisation and availability.

7. *How much can I modify the slides or notes to suit my style of presenting or my organisation's context?*

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.) Tailoring content, for example by substituting some of the provided materials and examples with your own content, is highly encouraged.

More information on adapting the content for your organisation can be found in the Programme Leader Guide (Step 3, Agree the Scope and Outcomes of the Programme).

Part 4

Appendices

Appendix 1

Mentor conversations

A mentor is usually someone with more experience and or qualifications than the mentee, who can pass on knowledge, experience and open doors to otherwise out-of-reach opportunities. The focus of the relationship is on career and personal development, and thus can last for during and beyond the programme. The meetings are usually informal, taking place as and when the mentee needs advice, guidance or support.

Points to note:

- The mentor should listen more than talk
- Both parties need to keep on track and stick to time
- Any conflict between the two parties should be aired and dealt with immediately
- Each person should keep notes on meetings and action points for development purposes
- Always pre-arrange meetings and avoid last minute cancellations
- Respect confidentiality of both parties.

Frameworks like the GROW model may be useful for using as a template. Alternatively, you may wish to use the below framework as a template.

Aims

- What is the purpose of the meeting?
- What do we need to achieve?

Progress

- What's happened since we last met?
- What has been completed?

Activities

- What development activity has taken place?
- What work projects are you working on?

Relationship

- What has the mentee and/or mentor done since the last meeting?

Issues

- What issues do both parties feel should be discussed?

Wellbeing

- How is the mentee feeling and how may that be impacting on their progress?

Some other useful questions as a mentor may be:

- What's the issue?
- What makes it an issue now?
- Who owns the issue?
- How important is it on a scale of 1–10?
- What have you already tried?
- In an ideal world, what would be happening about the issue?
- How would you know it has been resolved?
- What is standing in the way of the ideal outcome?
- What is going well right now?
- Imagine yourself at your most resourceful – what do you say to yourself about this issue?
- What are the options for action here?
- What criteria will you use to judge the options here?
- Which option seems best against these criteria?
- What's the first step to addressing the issue?
- When will you take it?

Try to avoid:

- Starting from the point of view that you know better than the mentee what's in his or her interest
- Being determined to share your wisdom with the mentee whether they want it or not
- Deciding what you and the mentee will talk about and when
- Doing most of the talking, checking frequently that the mentee is paying attention
- Neither showing nor admitting any personal weaknesses
- Expecting to be the mentee's role model in all aspects of career development and personal values
- Discouraging any signs of levity or humour
- Taking the mentee to task when they don't follow your advice.

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 divisional, organisational or system 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 and is comprised of three 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 a 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 stinker 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 *Trainer Guide* is part of the wider Quality Coach Development Programme © resource bundle. For more information visit:
https://q.health.org.uk/resource/quality-coach-development-programme/

Design by Studio Quercus

Quality Coach