



Quality Improvement Coach Competencies

Building Quality Improvement Capacity & Capability in Primary Healthcare

The Quality Improvement & Innovation Partnership (QIIP) Competency Document for the Quality Improvement Coach (QI Coach) defines the key competencies required for the position to practice as an external, consultative coach in primary healthcare. The key reference for this competency document is the CanMEDS Framework from the Royal College of Physicians and Surgeons of Canada, originally developed in 1996 and re-launched in 2005.

The competency document includes seven roles:

- QI Expert
- Communicator
- Collaborator
- Systems Thinker
- Manager
- Educator & Scholar
- Leader



The seven roles and accompanying key and enabling competencies describe the application of relevant knowledge, skills and concepts as observable behaviors.

The focus on professional development for the QI Coach will be demonstrated by integration of the competencies via the following applications:

- Developing learning & development plans via a process of self-assessment (key result areas)
- Developing learning curriculum
- Establishing mentoring guidelines
- Defining levels of performance
- Implementing performance measurement (self-review; 360 review; peer & manager review)

QI Expert

Elements:

- Quality Improvement (QI) theory, methodology & tools (Model for Improvement, Lean, Kaizen, etc)
- Data collection, analysis and interpretation (measurement)
- Creative thinking
- Change theory

Definition: As *QI Experts*, Quality Improvement (QI) Coaches integrate all of the competencies of a QI professional in their external consultative coaching role. They apply QI theory and knowledge, coaching and facilitation skills and use change theory and their professional attitudes to advance QI methodology in primary healthcare. *QI Expert* is the central competency of the QI Coach role. As the conduit for all competencies, the QI Expert is the lens through which each role and related competencies are performed and observed.

Description: The role of QI Expert is central to the function of QI coaches and draws on the competencies included in the roles of Communicator, Collaborator, Manager, Educator and Scholar, Systems Thinker and Leader (Professional). QI Coaches possess a defined body of knowledge, coaching and facilitation skills and professional attitudes, which are directed to the integration and application of QI methodology in team-based, primary healthcare. They apply these competencies with their teams to collect and interpret data, explore creative options, use QI methodology and tools, make appropriate decisions, integrate and apply change theory, measure and evaluate change and carry out the external support role of consultative coach. They do so within the boundaries of their collaborative external role and expertise, the healthcare setting and the team's experience, preferences and context.

Key Competencies: *QI Coaches are able to...*

1. Function effectively as collaborative, external consultants, integrating all of the QI Coach roles to coach and facilitate ethical and team-centered QI integration and application;
2. Establish and maintain QI knowledge, skills and concepts appropriate to their practice;
3. Perform a complete and appropriate assessment of a team, system of care, data and outcomes;
4. Use coaching and facilitation skills effectively in the application of change theory;
5. Demonstrate proficient and appropriate use of QI methodology tools;
6. Seek appropriate consultation from other health or QI professionals, recognizing the limits of their expertise.

Enabling Competencies: *QI Coaches are able to...*

- 1. Function effectively as collaborative, external consultants, integrating all of the QI Coach roles to coach/facilitate ethical and team-centered QI integration and application**

- 1.1. Effectively provide ongoing consultation to teams including assessment of readiness, progress and/or challenges, interpretation of improvement data, knowledge transfer regarding preferred improvement methods and change ideas, integration & application of change theory and presentation of findings;
- 1.2. Demonstrate effective use of all QI Coach Competencies relevant to their practice;
- 1.3. Identify, prioritize and appropriately respond to relevant quality improvement issues arising in team-based primary patient care.

2. Establish and maintain QI knowledge, skills and concepts appropriate to their practice

- 2.1. Apply QI knowledge, skills and concepts relevant to a team's capability (readiness for change) and capacity;
- 2.2. Apply lifelong learning skills to implement a continuing professional development program to keep current, and enhance areas of professional QI competence;
- 2.3. Contribute to the enhancement of quality care in primary healthcare teams, integrating the available best evidence and best practices.

3. Perform a complete and appropriate assessment of a team, system of care, data and outcomes

- 3.1. Effectively identify and explore QI opportunities to be addressed in a primary healthcare setting, including the team's capability and capacity, readiness for and acceptance of change;
- 3.2. Demonstrate effective QI problem solving and analysis to improve primary healthcare team and care delivery gaps, including interpreting available data and integrating information to generate positive change and leadership plans.

4. Use coaching and facilitation skills effectively in the application of change theory

- 4.1. Implement an effective coaching and facilitation plan in collaboration with a team to achieve change;
- 4.2. Demonstrate effective, appropriate, and timely application of coaching and facilitation interventions relevant to a QI opportunity in a team's practice.

5. Demonstrate proficient and appropriate use of QI methodology tools

- 5.1. Demonstrate effective, appropriate, and proficient use of QI methodological tools relevant to the quality initiative and team's capability and capacity;
- 5.2. Appropriately document and/or disseminate information related to tools used and their outcomes;
- 5.3. Provide ongoing support for change through strategic follow-up and interventions.

6. Seek appropriate consultation from other health or QI professionals, recognizing the limits of their expertise

6.1. Demonstrate insight into their limitations of expertise via self-assessment;

6.2 Demonstrate effective, appropriate, and timely consultation of other health or QI professional as needed for optimal team support.

Communicator

Elements:

- Effective listening (eliciting and synthesizing information)
- Consultative coaching
- Effective communication (verbal/nonverbal)
- Effective presentation of relevant information (oral & written)
- Empathic relationship building with rapport & trust
- Respect for diversity & flexibility in communication
- Self-awareness

Definition: As *Communicators*, QI Coaches effectively communicate with primary healthcare and other stakeholders (oral and written).

Description: QI Coaches demonstrate effective communication skills and styles. The competencies of this role are essential for establishing rapport and trust, eliciting, synthesizing and delivering information, striving for mutual understanding, and executing a QI plan. Effective communication is critical for an optimal relationship between the collaborative, external QI coach and the primary healthcare team as well as with QI colleagues and other professionals.

Key Competencies: *QI Coaches are able to...*

1. Develop rapport, trust and ethical relationships with QI colleagues and primary healthcare teams;
2. Elicit and synthesize relevant information and perspectives of colleagues and teams;
3. Convey relevant non-judgmental information to colleagues and teams, both oral and written;
4. Develop a common understanding.

Enabling Competencies: *QI Coaches are able to...*

1. Develop rapport, trust, and ethical relationships with QI colleagues and primary healthcare teams

- 1.1. Recognize that being a good communicator is a core skill for QI coaches, and demonstrate coach-team communication that fosters QI coach satisfaction, team satisfaction, implementation of QI practices and improved healthcare outcomes;

- 1.2. Establish positive relationships with QI colleagues and teams that are characterized by understanding, trust and respect, suspension of judgment, honesty and empathy;
- 1.3. Respect patient/team confidentiality, boundaries, privacy and autonomy;
- 1.4. Effectively facilitate a structured coaching encounter through effective listening, awareness and responsiveness to nonverbal cues;
- 1.5. Demonstrate use of an empowering approach to build and sustain a culture of improvement within the primary care organization.

2. Elicit and synthesize relevant information and perspectives of colleagues and teams

- 2.1. Gather information and identify QI opportunities and team readiness through a variety of methods;
- 2.2. Seek out and synthesize relevant information surrounding the past change experiences of the team including team dynamics and system of care processes;
- 2.3. Recognize the role of the self in interactions and act as internal observer in order to support productive interactions.

3. Convey relevant non-judgmental information to colleagues and teams, both oral and written;

- 3.1. Deliver information to colleagues and teams in an effective professional manner and in such a way that it is understandable, encourages discussion and participation in decision-making;
- 3.2. Maintain clear, accurate, and appropriate documentation (e.g. written or electronic) of team encounters, plans and consultation with QI colleagues;
- 3.3. Effectively present relevant information to QI colleagues and teams using multiple methodologies including informal verbal discussions, oral presentations, written updates and formal written reports.

4. Develop a common understanding

- 4.1. Respect diversity and differences;
- 4.2. Encourage discussion, questioning and interaction of a team;
- 4.3. Engage in shared decision-making through empowering consultative coaching;
- 4.4. Address challenging communication issues and conflict.

Collaborator

Elements:

- Conflict intervention & resolution
- Constructive negotiation
- Effective team building
- Consultative coaching (QI skills & change management)
- Strategies to enhance engagement
- Facilitation
- Team observation/assessment of organizational structure & relationships
- Provision of feedback
- Interprofessional role recognition

Definition: As *Collaborators*, QI Coaches effectively develop relationships with primary healthcare teams and other stakeholders to apply QI methodology to improve healthcare and related outcomes.

Description: QI Coaches work in partnership with primary healthcare teams. Healthcare delivery is complex and involves many stakeholders. Therefore it is essential for QI Coaches to collaborate effectively with an interprofessional team of expert health and QI professionals, to enable a quality initiative to improve health outcomes and maintain a culture of patients as partners in the delivery of primary healthcare. The promotion of healthy team functioning is integral to support the consultative coaching role of the collaborator.

Key Competencies: *QI Coaches are able to...*

1. Participate effectively and appropriately in an external consultative coaching role with primary healthcare;
2. Effectively work with individuals to identify, mitigate, negotiate, and resolve conflict.

Enabling Competencies: *QI Coaches are able to...*

1. Participate effectively and appropriately in an external consultative coaching role with primary healthcare

- 1.1. Describe the roles and responsibilities of individuals in primary healthcare;
- 1.2. Recognize and respect the diversity of roles, complexity of relationships, responsibilities and competencies of other professionals;
- 1.3. Work with others to integrate and apply QI methodology in the healthcare setting;
- 1.4. Participate effectively in interprofessional team meetings;
- 1.5. Describe and apply the principles of team dynamics;
- 1.6. Respect team ethics (including confidentiality, boundaries), resource allocation and

professionalism;

1.7. Demonstrate an empowering approach and share decision-making on quality initiatives through consultative coaching.

2. Effectively work with individuals to identify, mitigate, negotiate, and resolve conflict

2.1. Demonstrate a respectful attitude towards colleagues and members of an interprofessional team;

2.2. Work with other professionals to identify & mitigate conflicts;

2.3. Employ constructive negotiation to resolve conflicts;

2.4. Respect differences, misunderstandings and limitations in other professionals;

2.5. Recognize one's own differences, misunderstanding and limitations that may contribute to interprofessional tension;

2.6. Reflect on interprofessional team function.

Systems Thinker

Elements:

- "Population based" health
- Determinants of health
- Healthcare system
- Interconnected clinical systems (micro, meso, macro)
- Complexity of systems
- Clinical knowledge
- Clinical application
- Clinical practice guidelines
- Integration of evidence-based approach
- Frameworks
- Leadership – clinical, administrative, systems

Definition: As *Systems Thinkers*, QI Coaches recognize the interaction and relationship of the many complex systems that determine population health. Therefore, they use multiple perspectives, expertise and influence to advance quality improvement integration and application.

Description: QI Coaches recognize the relationship between the complex systems that drive the outcomes and processes of the healthcare system overall and the primary healthcare system in particular. QI coaches are skilled in applying clinical practice guidelines to the QI process. The focus on

population-based health and recognition of the importance of a systems approach to their work defines the QI coach role.

Key Competencies: *QI Coaches are able to...*

1. Identify the complex systems that represent the healthcare system;
2. Demonstrate the integration and application of knowledge of the complex healthcare system into QI coaching.

Enabling Competencies: *QI Coaches are able to...*

1. Identify the complex systems that represent the healthcare system

- 1.1. Identify the systems and interconnectedness of the healthcare system in Ontario;
- 1.2. Describe the opportunities for improvement of processes and systems across healthcare sectors focusing on primary healthcare as the foundation;
- 1.3. Define the relevant frameworks that describe the systems within healthcare.

2. Demonstrate the integration and application of the complex healthcare system into QI coaching

- 2.1. Identify opportunities for improvement in chronic disease management, health promotion, disease prevention and office practice redesign;
- 2.2. Identify the determinants of health of populations, including barriers to access and resources;
- 2.3. Identify vulnerable or marginalized populations within those served and coach and facilitate teams to respond appropriately.

Manager

Elements:

- Information management
- Information technology
- Activity reporting
- Time management
- Priority setting
- Effective meeting management
- Allocating resources
- Administrative skills

- Project management
- Delegation

Definition: *As Managers*, QI Coaches progressively allocate resources, set priorities and reflectively manage their own professional career and QI initiatives assimilating time and information management skills.

Description: QI Coaches have identified management responsibilities as a core requirement for their profession. They function as self-managers in their everyday practice activities and manage resources, organizational tasks and initiatives. QI Coaches require the ability to prioritize, effectively execute tasks collaboratively with colleagues and primary healthcare teams, and make systematic choices when allocating resources. In addition, QI Coaches recognize the boundaries of the role and demonstrate appropriateness in seeking consultation/assistance from Quality Improvement and Innovation Partnership (QIIP) leadership and colleagues.

Key Competencies: *QI Coaches are able to...*

1. Demonstrate the use of coordinated self-management, information management and resource management to effectively provide consultative coaching;
2. Define the boundaries of the QI Coach role in the role of self-manager.

Enabling Competencies: *QI Coaches are able to...*

1. Demonstrate the use of coordinated self-management, information management and resource management to effectively provide consultative coaching

- 1.1. Utilize self and time management effectively;
- 1.2. Employ information management using appropriate technologies;
- 1.3. Set priorities and systematically allocate and manage resources;
- 1.4. Submit reports according to required deadlines.

2. Define the boundaries of the QI Coach role in the role of self-manager.

- 2.1. Seek assistance/consultation from QIIP leadership and peers as appropriate;
- 2.2. Identify areas of emphasis that are outside of the boundaries of the QI Coach role and seek guidance appropriately.

Educator and Scholar

Elements:

- Reflective self-assessment

- Lifelong learner
- Utilization of learning methods
- Professional development
- Trainer
- Mentor
- Critical appraisal & evaluation
- Translation to practice
- Research, publication and presentation
- Knowledge management

Definition: *As Educators and Scholars*, QI Coaches progressively demonstrate a lifelong commitment to reflective learning. They integrate and apply their QI knowledge, leading to the translation of knowledge to practice, research, publication and presentation. In this way, QI coaches contribute to the advancement of the science of quality improvement.

Description: QI Coaches engage in a lifelong pursuit of mastering their domain of expertise. As learners, they recognize the need to be continually learning and model this for others. Through their scholarly activities, they contribute to the creation, dissemination, application, integration and translation to practice of QI knowledge. As teachers, they facilitate the education of their teams, colleagues, and others. As scholars, QI Coaches contribute to research, publications and presentations on innovations in QI methodology.

Key Competencies: *QI Coaches are able to...*

1. Maintain and enhance professional activities through ongoing learning;
2. Critically evaluate information and its sources, and apply this appropriately to coaching and facilitation of QI methodology content with teams;
3. Facilitate the learning of teams, colleagues and others, as a mentor and educator;
4. Contribute to the creation, dissemination, application, and integration of new QI knowledge leading to translation to practice, research, publication and presentation.

Enabling Competencies: *QI Coaches are able to...*

1. Maintain and enhance professional activities through ongoing learning

- 1.1. Recognize and reflect learning issues in practice;
- 1.2. Conduct a self-assessment of competencies and learning needs;
- 1.3. Pursue continuing professional development in QI theory, methodology, skills, coaching, facilitation and communication;
- 1.4. Translate new learning into practice;
- 1.5. Document the learning process.

2. Critically evaluate information and its sources, and apply this appropriately to coaching and facilitation of QI methodology content with teams

2.1. Access, critically appraise and interpret the relevant evidence for QI methodology content.

3. Facilitate the learning of teams, colleagues and others as a mentor and educator

3.1. Collaboratively identify the learning needs and desired learning outcomes of others (teams, colleagues, etc.);

3.2. Select effective teaching strategies and content to facilitate the learning of others;

3.3. Demonstrate effective written and verbal presentation skills;

3.4. Assess and reflect on a teaching encounter;

3.5. Provide effective feedback to peers and teams through consultative coaching and ongoing mentoring.

4. Contribute to the creation, dissemination, application, and integration of new QI knowledge leading to translation to practice, research, publication and presentation

4.1. Describe the principles of research and scholarly inquiry relative to QI knowledge;

4.2. Describe the principles of research ethics;

4.3. Pose a scholarly question;

4.4. Conduct a systematic search for evidence;

4.5. Select and apply appropriate research methods;

4.6. Appropriately disseminate the innovations through publication and presentation relative to new QI knowledge and practices.

Leader

Elements:

- “External” enabler
- Commitment to Excellence
- Mindfulness
- Capacity assessment
- Skill & knowledge mastery
- QI Ambassador
- Role model

- Value proposition of quality
- Strategic awareness – (QIIP) organizational alignment & affinity to vision

Definition: As *Leaders*, QI Coaches are committed to excellence in consultative coaching, ethical professional practice and high personal standards of behavior. This commitment leads to the development of QI capability and capacity in primary healthcare and represents QI expertise and benefit to other stakeholders.

Description: The work of the QI coach requires the mastery of a complex body of knowledge and skills surrounding QI methodology and team-based care delivery. The embracing of self-awareness, integrity and ethical professional practice form the basis of the relationship between the QI Coach, the interprofessional team and other stakeholders. QI Coaches are ambassadors to the power of quality improvement in primary healthcare.

Key Competencies: *QI Coaches are able to...*

1. Demonstrate a personal, professional commitment to excellence in consultative coaching;
2. Acts as an ambassador for quality improvement value to internal and external stakeholders.

Enabling Competencies: *QI Coaches are able to...*

1. Demonstrate a personal, professional commitment to excellence in consultative coaching

- 1.1. Exhibit appropriate professional behaviors in practice, including honesty, integrity, commitment, compassion, and respect;
- 1.2. Demonstrate behaviors aligned with the vision and mission statement of QIIP;
- 1.3. Demonstrate a commitment to delivering the highest quality facilitation, coaching and training to support teams within the context of a healthy work-life balance;
- 1.4. Strive to heighten personal and professional awareness and insight.

2. Acts as an ambassador for quality improvement value to internal and external stakeholders

- 2.1. Advocate the need for, the value of and the required investment for quality improvement in primary healthcare to diverse stakeholders.