The faculty coaching manual is inspired by the VA Geriatric Scholars Coaching Manual (September 2014) developed by the VA Geriatric Scholars Program in partnership with the GRECC and the Tennessee Valley Healthcare System. The SCAN|UCLA Best Practices team gratefully recognizes their willingness to share resources and advice on how best to guide teams through a quality improvement project.

Other quality improvement models and guidance are based on the Institute for Healthcare Improvement Quality Improvement Practicum: Faculty Advisor Guide.
Introduction
Welcome and thank you for being a faculty coach for the Best Practices Project. Your experience with quality improvement planning, implementation and sustainability will help our medical groups/IPAs take what they learned at the Summit and apply it in their home organizations over the next 6 months. Summit attendees have varying levels of experience in quality improvement and include primary care physicians, nurses, social workers and many others.

As a process coach, we need you to be proactive in guiding these groups in implementing their best practice.

Your Roles Before the Summit

- Familiarize yourself with all of the best practices, but focus on the best practices assigned to you. Please review slide presentations and background material so that you are able to offer specific guidance.
- Familiarize yourself with the Scoring Matrix (Appendix A), which you will need to fill out during the Summit.
- A brief presentation will be given during the plenary on Quality Improvement (QI)/Program Management, but please be prepared to elaborate on QI principles and tools that may be useful during implementation. The Summit attendees have varying levels of familiarity with QI methods; they will look to you for assistance in designing their best practice implementation. Please refer to the Quality Improvement Template Summary (Appendix B).
- Familiarize yourself with the Coach Checklist and Timeline which contains key activities and questions to complete during the action planning session (Appendix C).
- Familiarize yourself with the Action Plan and SMART Goals development processes. You will be guiding attendees through the Action Plan Template (Appendix D) in the afternoon.

Your Roles During the Summit

Serving on the Judging Panel to Select the Award Winning Best Practices

- **Round Robin** - Evaluate how well the speaker articulated the best practice and responded to questions. Evaluate how well the best practice fulfills the Scoring Matrix criteria.
  - At the summit you will be given a packet of five scoring sheets and will be asked to complete the sheets for each of the presentations you attended.

- **Working Lunch** – The judging panel, consisting of UCLA faculty coaches, will decide 1st-3rd prize for the 2014 Better Way to Care Award based on the tallied scoring matrix sheets. Please be prepared to discuss your perceptions and make a decision on awards.

Leading the Action Planning Session

- **Action Planning and SMART Goal Development** - Below is a guide for the two hour action planning session. Please make sure you have completed all steps by the conclusion of the session, or notify facilitator if your group needs to deviate from this schedule.
  - As a process coach you will support the implementation teams in developing a detailed Action Plan to adopt their selected best practice or components of a best practice.
- The five speakers will be available to you and your implementation teams as content coaches and may provide additional guidance to the groups by responding to more specific questions. The content coaches will be available to your group at a specific time slot and will be directed to your group at their assigned time period.
## Activity

### Introduction
- Briefly introduce yourself and your role during this activity
- Words of advice as they begin
- Quick overview of the Action Plan

### Define Best Practice and Identify Team Member Roles
- Identify, and clearly state on the Action Plan form, the best practice or component of best practice to be implemented
- Identify, and state on the Action Plan form, a best practice champion to lead the group and identify the roles of the various team members over the next 6 months.
- Assign a scribe for the action planning session to clearly fill out the action plan.

*The Action Plan will be turned in at the end of the Summit to be typed and returned to the teams (and coaches) via email. Any brainstorming, notes, charts, etc. should be completed on separately.*

### Discuss Implementation and Complete Action Plan Form

**Statement of Innovation**– Describe the best practice you plan to implement. Coaches should help their team clearly articulate these ideas.

**Goals** – Develop and list specific goals for why adopting this best practice will enhance your program/practice.

**Target Population** – Describe the target population or patients affected by this innovation.

**Statement of Goals** – Create three SMART goals to guide your plans for your best practice.

**Assessment** – Choosing QI methods to study the project. Examples of QI methods are available in the appendix.

**Measurement** – Choosing QI tools to measure the project.

**Commitment from Organizational Leadership** – Identifying necessary stakeholders.

**Resources** – What will be needed to accomplish the plan?

**Barriers** - Identifying potential obstacles or barriers to implementation.

**Strategies to Overcome Barriers** – Thinking through which strategies will be used.

**Time Frame** – Planning the next 6 months for implementation using the SMART Goal Gantt Chart.

**Consult with the content coach (Summit speakers) on specific aspects of the adaptation and adoption of the best practice. Content coaches will rotate between round tables in their assigned breakout room to ensure they have time to work with each team implementing their best practice.**
Review Action Plan and Finalize Next Steps

- Review Action Plan
- Final Q & A
- Turn in completed Action Plans. Our staff will type them the following week and email the implementation team and coach an electronic version.

Your Roles After the Summit

Coaches are responsible for guiding the planning and implementation of the best practice QI project

Each coach will have 1-2 medical groups/IPAs they will be coaching through a quality improvement project that will be selected at the Summit for six months. The size of each group will be dependent on how many staff members attend the Summit and which best practice or component of a best practice they decide to implement.

Specific roles include the following:

- **Lead Coaching sessions over the next six months, following the suggested curriculum topic schedule.** Calls should be scheduled every two weeks for the first month and then may decrease in frequency based on progress/need of Medical Group/IPA. Coach and Team Lead will decide during the first call which team members should be included in the conference calls.

- **Monitor the progress of your group(s) on the Best Practices Adoption Dashboard.** The Team Lead for each implementation team will be responsible for tracking their progress weekly using the Best Practices Adoption Dashboard (Appendix E).

- **Respond to ad-hoc requests from your medical groups via email and/or phone.** Coaches should be available to answer questions and provide support in resolving issues between scheduled meetings.

- **Following each call with your medical group, fill out the Coach Feedback Questions on Best Practice Implementation.** This tool will facilitate structured monitoring of the progress made by each of your teams and will be used as reference during the monthly coaches meetings (Appendix F).

- **Attend internal monthly calls with coaches.** The purpose of these calls is to discuss progress, troubleshoot, discuss common problems and share ideas. Coaches may sign up to present a case study and request feedback from the group. This is modeled on clinical vignettes to problem solve and share ideas for treating complex patients.

Schedule for Coaching Calls

This will largely be determined by availability of team members and faculty coaches. Aim for meeting every 2 weeks at first, but once a month at a minimum to connect on how well the implementation is going and troubleshoot barriers before too much time has passed. During each call, you will need to refer back to the electronic copy of the Action Plan that was developed during the Summit and record the progress in the Gantt chart. Groups that are advancing smoothly may only need a short call to check in. Groups that are in need of more assistance will require longer calls.
## Curriculum for Bi-Monthly Coaching Calls

<table>
<thead>
<tr>
<th>Call</th>
<th>Topic</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preliminary</td>
<td>Sign-in to Best Practices Adoption Dashboard</td>
<td>Review how to use tool and expectations. This dashboard is designed to mimic the process of the call and will be used over the next 6 months.</td>
</tr>
<tr>
<td></td>
<td>Review &amp; Update Gantt Chart</td>
<td>Make updates and discuss timeline.</td>
</tr>
<tr>
<td></td>
<td>Action Items:</td>
<td>Decide which piece(s) of Gantt Chart to focus on for next call.</td>
</tr>
<tr>
<td></td>
<td>Housekeeping</td>
<td>Has implementation team been formed?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>How often will the team meet without you?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Who will participate in conference calls?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ready to begin effort? (Buy-in from stakeholders, etc.)</td>
</tr>
<tr>
<td></td>
<td>Post Call</td>
<td>Complete Coaches Tool.</td>
</tr>
<tr>
<td>Call 1</td>
<td>Check in</td>
<td>Accomplishments/barriers since last call.</td>
</tr>
<tr>
<td></td>
<td>Action Items</td>
<td>Review Gantt chart.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Determine next steps.</td>
</tr>
<tr>
<td></td>
<td>Housekeeping</td>
<td>Is the Dashboard being completed by the team?</td>
</tr>
<tr>
<td></td>
<td>Post Call</td>
<td>Complete Coaches Tool.</td>
</tr>
<tr>
<td>Call 2</td>
<td>Check in</td>
<td>Accomplishments/barriers since last call.</td>
</tr>
<tr>
<td></td>
<td>Action Items</td>
<td>Review Gantt chart.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Determine next steps.</td>
</tr>
<tr>
<td></td>
<td>Housekeeping</td>
<td>Is the Dashboard being completed by the team?</td>
</tr>
<tr>
<td></td>
<td>Post Call</td>
<td>Complete Coaches Tool.</td>
</tr>
<tr>
<td>Call 3</td>
<td>Check in</td>
<td>Accomplishments/barriers since last call.</td>
</tr>
<tr>
<td></td>
<td>Action Items</td>
<td>Review Gantt chart.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Determine next steps.</td>
</tr>
<tr>
<td></td>
<td>Housekeeping</td>
<td>Is the Dashboard being completed by the team?</td>
</tr>
<tr>
<td></td>
<td>Post Call</td>
<td>Complete Coaches Tool.</td>
</tr>
<tr>
<td>Call 4</td>
<td>Check in</td>
<td>Accomplishments/barriers since last call.</td>
</tr>
<tr>
<td></td>
<td>Action Items</td>
<td>Review Gantt chart.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Determine next steps.</td>
</tr>
<tr>
<td></td>
<td>Housekeeping</td>
<td>Is the Dashboard being completed by the team?</td>
</tr>
<tr>
<td>Call</td>
<td>Check in</td>
<td>Accomplishments/barriers since last call.</td>
</tr>
<tr>
<td>------</td>
<td>----------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>Action Items</td>
<td>Review Gantt chart. Determine next steps. DUE: midpoint QI report</td>
<td></td>
</tr>
<tr>
<td>Housekeeping</td>
<td>Is the Dashboard being completed by the team?</td>
<td></td>
</tr>
<tr>
<td>Post Call</td>
<td>Complete Coaches Tool.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Call 6</th>
<th>Check in</th>
<th>Accomplishments/barriers since last call.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Items</td>
<td>Review Gantt chart. Determine next steps. DUE: midpoint QI report</td>
<td></td>
</tr>
<tr>
<td>Housekeeping</td>
<td>Is the Dashboard being completed by the team?</td>
<td></td>
</tr>
<tr>
<td>Post Call</td>
<td>Complete Coaches Tool.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Call 7</th>
<th>Check in</th>
<th>Accomplishments/barriers since last call.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Items</td>
<td>Review Gantt chart. Determine next steps. Evaluate how well the best practice was implemented and how the process could be improved for future QI implementations.</td>
<td></td>
</tr>
<tr>
<td>Housekeeping</td>
<td>Is the Dashboard being completed by the team?</td>
<td></td>
</tr>
<tr>
<td>Post Call</td>
<td>Complete Coaches Tool.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Call 8</th>
<th>Check in</th>
<th>Accomplishments/barriers since last call.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Items</td>
<td>Review Gantt chart. Determine next steps.</td>
<td></td>
</tr>
<tr>
<td>Housekeeping</td>
<td>Is the Dashboard being completed by the team?</td>
<td></td>
</tr>
<tr>
<td>Post Call</td>
<td>Complete Coaches Tool.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Call 9</th>
<th>Check in</th>
<th>Accomplishments/barriers since last call.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Items</td>
<td>Review Gantt chart. Determine next steps.</td>
<td></td>
</tr>
<tr>
<td>Housekeeping</td>
<td>Is the Dashboard being completed by the team?</td>
<td></td>
</tr>
<tr>
<td>Post Call</td>
<td>Complete Coaches Tool.</td>
<td></td>
</tr>
</tbody>
</table>

| Call 10 | Check in | Accomplishments/barriers since last call. |
| Call 11 | Action Items | Review Gantt chart.  
|         |              | Determine next steps.  
|         |              | Start thinking about sustainability.  
|         | Housekeeping | Is the Dashboard being completed by the team?  
|         | Post Call    | Complete Coaches Tool.  
|         | Check in     | Accomplishments/barriers since last call.  
|         | Action Items | Review Gantt chart.  
|         |              | Determine next steps.  
|         | Housekeeping | Is the Dashboard being completed by the team?  
|         | Post Call    | Complete Coaches Tool.  
| Call 12 | Are additional calls needed?  
|         | DUE: Final QI report |
## Appendix

### A. Scoring Matrix

<table>
<thead>
<tr>
<th>Selection Criteria</th>
<th>Unsatisfactory (0 points)</th>
<th>Satisfactory (1 point)</th>
<th>Excellent (2 points)</th>
<th>Total Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need Identified</td>
<td>1. Incomplete QI plan</td>
<td>1. QI plan developed</td>
<td>1. QI plan developed, implemented &amp; staff trained</td>
<td>&lt;br&gt;1. QI plan developed, implemented &amp; staff trained&lt;br&gt;2. QI plan developed&lt;br&gt;3. Regular data collection</td>
</tr>
<tr>
<td>Quality of Care is Measurable (Patient Satisfaction)</td>
<td>1. No evidence of improvement</td>
<td>1. Some evidence of improvement</td>
<td>1. Demonstrates meaningful impact</td>
<td>&lt;br&gt;1. Demonstrates meaningful impact&lt;br&gt;2. Regular data collection using survey tools</td>
</tr>
<tr>
<td>Cost Savings per Patient is Measurable</td>
<td>1. No evidence of savings</td>
<td>1. Some evidence of cost savings</td>
<td>1. Demonstrates reduction is cost per patient</td>
<td>&lt;br&gt;1. Demonstrates reduction is cost per patient&lt;br&gt;2. Regular data collection</td>
</tr>
<tr>
<td>Demonstrates improvement in health</td>
<td>1. No low evidence</td>
<td>1. Some evidence collected</td>
<td>1. Demonstrates meaningful impact</td>
<td>&lt;br&gt;1. Demonstrates meaningful impact&lt;br&gt;2. Regular data collection</td>
</tr>
<tr>
<td>Easily adaptable to many settings</td>
<td>1. No, too specific to one care setting</td>
<td>1. Yes, but will require hiring or significant staff training</td>
<td>1. Yes, easily adapted in other settings</td>
<td>&lt;br&gt;1. Yes, easily adapted in other settings&lt;br&gt;2. Use existing staff with ease</td>
</tr>
<tr>
<td>Sustainability</td>
<td>1. Demonstration project/pilot only</td>
<td>1. Funding year-to-year</td>
<td>1. Budget neutral or ongoing financial support</td>
<td>&lt;br&gt;1. Budget neutral or ongoing financial support&lt;br&gt;2. Comprehensive staff training to sustain change</td>
</tr>
</tbody>
</table>

**Grand Total**
B. Quality Improvement Template Summary

When starting a quality improvement project it is important to choose templates or tools to focus your planning and implementation efforts and to test for effectiveness. There are many tools available, each highlighting different aspects of the QI process. Below is a summary of a few more commonly used methods.

Ishikawa (Fishbone) Diagram
- Cause and effect template

Run Chart
- Graphs data over time

Flow Chart
- Graphic representation of a process

Plan-Do-Study-Act (PDSA)
- Cyclical process resulting in continuous quality improvement to test a change.
### C. Coach Check List & Timeline

Key activities and questions to complete during the Action Planning session

<table>
<thead>
<tr>
<th>(10 minutes)</th>
<th>Team will identify their roles and define best practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>Introduce yourself to your team</td>
</tr>
<tr>
<td>☐</td>
<td>Make sure the team appoints one person to scribe, write legibly</td>
</tr>
<tr>
<td>☐</td>
<td>Help the team to identify which components of the best practice they can accomplish in 6 months</td>
</tr>
<tr>
<td>☐</td>
<td>Who will be their best practice champion?</td>
</tr>
<tr>
<td>☐</td>
<td>Who are the team members? Do they have the time to make this commitment?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(30 minutes)</th>
<th>Discuss Implementation and Complete Action Plan Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>Statement of Innovation</td>
</tr>
<tr>
<td>☐</td>
<td>Goals</td>
</tr>
<tr>
<td>☐</td>
<td>Target Population</td>
</tr>
<tr>
<td>☐</td>
<td>SMART Goals</td>
</tr>
<tr>
<td>☐</td>
<td>Help the team to create SMART goals that can be accomplished in 6 months</td>
</tr>
<tr>
<td>☐</td>
<td>Content coaches will be available and will rotate between tables</td>
</tr>
<tr>
<td>☐</td>
<td>Assessment</td>
</tr>
<tr>
<td>☐</td>
<td>Discuss QI methods to study your project (examples in appendix)</td>
</tr>
<tr>
<td>☐</td>
<td>Measurement</td>
</tr>
<tr>
<td>☐</td>
<td>Discuss sources of data for measuring your project process and outcomes</td>
</tr>
<tr>
<td>☐</td>
<td>Identifying Stakeholders</td>
</tr>
<tr>
<td>☐</td>
<td>Resources</td>
</tr>
<tr>
<td>☐</td>
<td>Help them think through implementation</td>
</tr>
<tr>
<td>☐</td>
<td>Barriers</td>
</tr>
<tr>
<td>☐</td>
<td>Overcoming Barriers</td>
</tr>
<tr>
<td>☐</td>
<td>Completing Gantt Chart</td>
</tr>
<tr>
<td>☐</td>
<td>Provide guidance on when to start and complete specific activities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(15 minutes)</th>
<th>Review Action Plan and Finalize Next Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>Review the completed action plan</td>
</tr>
<tr>
<td>☐</td>
<td>Discuss and finalize next steps in best practice implementation</td>
</tr>
<tr>
<td>☐</td>
<td>Turn in Action Plan and supporting documents. Documents will be typed and emailed to the teams and coaches the following week.</td>
</tr>
</tbody>
</table>
D. Action Plan Template

CONTACT INFORMATION

Team Lead, Position: ______________________________________________________

Team Members & Positions: ________________________________________________
______________________________________________________________________
______________________________________________________________________

Medical Group/IPA: _______________________________________________________

Team Lead Phone: ________________________________________________________

Team Lead Email: _________________________________________________________

Scribe Name: _____________________________________________________________

Scribe Phone: ____________________________________________________________

Scribe Email: _____________________________________________________________

STATEMENT OF INNOVATION:
1) We plan to use the following best practice we learned from the Summit:
______________________________________________________________________
______________________________________________________________________

2) The goals of adopting this best practice will enhance our program/practice in the following ways:
1.________________________________________________________
2.________________________________________________________
3.________________________________________________________
4.________________________________________________________

3) The target population/patients for our innovation will be:
______________________________________________________________________
______________________________________________________________________
STATEMENT OF GOALS:
Please describe the best practice you plan to complete. Use SMART goals (Specific, Measurable, Achievable, Realistic/Results Oriented and Time Dated) to guide your plans.

SMART Goal Example:

“By February 2015, all planning meetings will be paperless by using tablets so notes can be shared electronically to facilitate communication.”

- **Specific: What, Why, How**
  - What: all planning meetings will be paperless
  - Why: to facilitate communication
  - How: by using tablets
- **Measurable**: whether or not all meetings are paperless by 2/2015
- **Achievable**: participants have tablets and know how to use them
- **Results Oriented**: notes are shared electronically
- **Time Dated**: by 2/2015

SMART Goal #1

___________________________
___________________________
___________________________
___________________________
___________________________
___________________________
___________________________
___________________________
___________________________
___________________________
___________________________
___________________________
___________________________
___________________________
___________________________
___________________________

Specific: What will the goal accomplish? Why and How will it be accomplished?

What: ____________________________________________________________

___________________________
___________________________
___________________________
___________________________
___________________________
___________________________

Why: ____________________________________________________________

___________________________
___________________________
___________________________
___________________________
___________________________
___________________________

How: ____________________________________________________________

___________________________
___________________________
___________________________
___________________________
___________________________
___________________________

Measurable: How will you measure whether or not the goal has been reached?

___________________________

Achievable: Do you have the necessary knowledge, skills, and resources to accomplish this goal?

___________________________

Results Oriented: What is the reason, purpose or benefit of accomplishing this goal?

___________________________

Time Dated: What is the completion date?

___________________________
SMART Goal #2

_________________________________________________

_________________________________________________

_________________________________________________

Specific: What will the goal accomplish? Why and How will it be accomplished?

What: ______________________________________________

_________________________________________________

Why: ______________________________________________

_________________________________________________

How: ______________________________________________

_________________________________________________

Measurable: How will you measure whether or not the goal has been reached?

_________________________________________________

Achievable: Do you have the necessary knowledge, skills, and resources to accomplish this goal?

_________________________________________________

Results Oriented: What is the reason, purpose or benefit of accomplishing this goal?

_________________________________________________

Time Dated: What is the completion date?

_________________________________________________
SMART Goal #3

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Specific: What will the goal accomplish? Why and How will it be accomplished?

What: _______________________________________________________________

________________________________________________________________________

Why: _______________________________________________________________

________________________________________________________________________

How: _______________________________________________________________

________________________________________________________________________

Measurable: How will you measure whether or not the goal has been reached?

________________________________________________________________________

Achievable: Do you have the necessary knowledge, skills, and resources to accomplish this goal?

________________________________________________________________________

Results Oriented: What is the reason, purpose or benefit of accomplishing this goal?

________________________________________________________________________

Time Dated: What is the completion date?

________________________________________________________________________
ASSESSMENT:
1. Which QI methods do you plan to use to study your project?
   a. Flow Chart, PDSA, etc.

MEASUREMENT:
1. Which sources of data do you plan to use to measure your project process and outcomes?
   a. Administrative data, chart audits, surveys, etc.

THINKING THROUGH ACTIVITIES TO IMPLEMENT YOUR PLAN:

A. Commitment from Organizational Leadership: Identify who needs to be aware of your action plan and goals for this QI project. Are they at the table already? If not, how will you get buy-in from necessary stakeholders?

We will need to communicate with the following people:

<table>
<thead>
<tr>
<th>Person’s name and title</th>
<th>Who will communicate with them?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
</tr>
</tbody>
</table>
B. **Resources:** Identify what other resources you will need to accomplish your plan. Resources may include: personnel, time, financial requirements, leadership, and support from a committee or administrator.

We will need the following resources:

1. _______________________________________________________
2. _______________________________________________________
3. _______________________________________________________
4. _______________________________________________________

C. **Barriers:** Please identify potential obstacles or barriers to implementing your plan.

We anticipate the following obstacles/barriers:

1. _______________________________________________________
2. _______________________________________________________
3. _______________________________________________________
4. _______________________________________________________

D. **Strategies to overcome barriers:**

We will use these strategies to overcome the obstacles outlined above:

1. _______________________________________________________
2. _______________________________________________________
3. _______________________________________________________
4. _______________________________________________________
**TIME FRAME**

The innovation should be delivered during the next 6 months, with preliminary meetings starting after the Summit. Quality Improvement and implementation work with faculty coaches will occur over the next 6 months. In order to stay on track for delivering your innovation, below is a Gantt chart for you to complete. Please list your S.M.A.R.T. goals, who will lead the effort, and whether or not you will need the assistance of your coach. Next, identify when your efforts will begin, for example the first two weeks of the first month (1.1) or the last two weeks of the first month (1.2). At this point you should only complete “proposed” (top line), you’ll complete “actual” in real time.
| S.M.A.R.T. GOAL #1 | WHO WILL LEAD THIS EFFORT? | NEED COACH’S ASSISTANCE? | 6 Months | 1.1 | 1.2 | 2.1 | 2.2 | 3.1 | 3.2 | 4.1 | 4.2 | 5.1 | 5.2 | 6.1 | 6.2 |
|--------------------|-----------------------------|--------------------------|----------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 1.                 | Proposed                     |                          |          |     |     |     |     |     |     |     |     |     |     |     |
|                    | Actual                       |                          |          |     |     |     |     |     |     |     |     |     |     |     |
| 2.                 | Proposed                     |                          |          |     |     |     |     |     |     |     |     |     |     |     |
|                    | Actual                       |                          |          |     |     |     |     |     |     |     |     |     |     |     |
| 3.                 | Proposed                     |                          |          |     |     |     |     |     |     |     |     |     |     |     |
|                    | Actual                       |                          |          |     |     |     |     |     |     |     |     |     |     |     |

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### Best Practices Adoption Dashboard

**SCAN | UCLA Best Practices Adoption Dashboard**

**Best Practice X at Medical Group XYZ - Call #**

Each dashboard will be personalized to each implementation team with the name of their best practice and their group. These brief surveys will be sent out weekly to the teams to record their progress, identify barriers and ask questions. The dashboard also provides a convenient way to communicate with their coaches.

1. **Please describe how much progress you made on implementing your “Specific Activity from Gantt chart”?**
   - [ ] No Progress
   - [ ] Moderate Progress
   - [ ] Substantial Progress

2. **Did you encounter any barriers in making progress?**
   - [ ] Yes
   - [ ] No

**Best Practice X at Medical Group XYZ - Call #**

3. **What types of barriers? Please describe**

**Best Practice X at Medical Group XYZ - Call #**

4. **Do you have any questions or requests for your coach?**
   - [ ] Yes
   - [ ] No

**Best Practice X at Medical Group XYZ - Call #**

5. **Please list/describe your questions or requests for your coach.**

**Best Practice X at Medical Group XYZ - Call #**
F. Coach Feedback Questions on Best Practice Implementation

This coach feedback tool is designed to collect information based on information collected from team calls over the last month. Thank you for taking the time to provide this information to the management team. (Skip pattern will be used based on responses)

1) When looking at the Gantt Chart, I can confidently say that my team is on track.
   - Strongly disagree
   - Disagree
   - Uncertain
   - Agree
   - Strongly agree
   
   If Strongly disagree or Disagree, please explain. [text box] (skip pattern)
   Has the timeline changed? Yes, No [text box]

2) My team has made substantial progress.
   - Strongly disagree
   - Disagree
   - Uncertain
   - Agree
   - Strongly agree

3) My team has been successful in surmounting all anticipated barriers.
   - Strongly disagree
   - Disagree
   - Uncertain
   - Agree
   - Strongly agree
   
   If Strongly disagree or Disagree, please explain [text box] (skip pattern)
   Was one of these barriers buy-in? Yes, No
   Were you able to assist them? Yes, No

4) My team has been successful in surmounting all unanticipated barriers.
   - Strongly disagree
   - Disagree
   - Uncertain
   - Agree
   - Strongly agree
   
   If Strongly disagree or Disagree, please explain [text box] (skip pattern)
   What were these barriers? [text box]
   Were you able to assist them? Yes, No

5) My team has worked well together, fulfilling their assigned roles.
   - Strongly disagree
   - Disagree
   - Uncertain
   - Agree
   - Strongly agree
   
   If Strongly disagree or Disagree, please explain what the team work issues are. For example, is one person working more than others, do some people not participate? [text box] (skip pattern)

6) My team communicates with each other regularly (meetings, conference calls, emails, etc.).
   - Strongly disagree
   - Disagree
   - Uncertain
   - Agree
   - Strongly agree
   
   If Strongly disagree or Disagree, please explain [text box] (skip pattern)

7) My team members have been engaged and committed.
   - Strongly disagree
   - Disagree
   - Uncertain
   - Agree
   - Strongly agree
   
   If Strongly disagree or Disagree, please explain [text box] (skip pattern)
   How would you remedy the situation? [text box] (skip pattern)