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**Quality Improvement Practitioner Programme**

**QI Mentor Guidance**

1. **Quality Improvement Mentor Role**

The role of the Quality Improvement (QI) Mentor is to provide advice and guidance on the application of QI thinking and methodology, while offering support and encouragement to our QI Practitioners during their time on the programme.

QI Mentors also help to identify where individual QI Practitioners might need additional support, e.g. where their mentoring advice does not appear to be being considered or there are doubts that QI Practitioners are progressing against the programme learning outcomes.

While the details of the QI Mentoring arrangement will be down to the QI Practitioner and QI Mentor to define between them, as a minimum, the role includes:

* Review and feedback on the QI Practitioner’s project charter
* Review and feedback on each of the QI Practitioner’s monthly project updates within seven days of the report being submitted (late submissions may affect this turnaround time)
* While QI Practitioners are encouraged to self-study as part of a blended learning approach, QI Mentors may also be asked for ad hoc support as required. This is likely to include advice on project charters, driver diagrams, PDSA testing, measurement plans and data, as well as the human side of change.
1. **Organisational Managers**

QI Practitioners have sought support of their organisational line manager. The managers should help QI Practitioners navigate organisational barriers and enablers on their development journey. This could include:

* helping to address any issues around dedicated time or other organisational barriers to progressing their project
* providing support in finding a suitable area of work for their project
* providing feedback on early drafts of their project charter to ensure their project is of a suitable scope and fits with organisational objectives.

We would encourage organisational managers to have regular support meetings with the QI Practitioner and may find benefit in engaging in three-way dialogue involving the QI Practitioner and QI Mentor to maximize the support of their participant.

1. **Process for Report Feedback**
2. QI Practitioners should send you their monthly report via email (by 15th of each month).
3. Insert feedback comments (either as comments in the report or providing them in an email/doc) – please aim to do this **within seven days of the report being submitted** so that QI Practitioners have time to act on your feedback before their next report is due and/or can seek additional support during the next Learning Session.
4. Send report with feedback comments back to the QI Practitioner and their organisational manager.
5. **Late Submission**

It is the QI Practitioner’s responsibility to submit their monthly report on time. If a QI Practitioner does not submit on time, and no exceptional circumstances have been reported, the Community Planning team will issue a reminder, copying the QI Mentor in and escalating this to the Improvement Programme Manager, if required.

Volume of work and annual leave, including periods outwith term time, are not considered exceptional circumstances and QI Practitioners are expected to plan their submissions around this.

Where possible QI Mentors should feedback with seven days of the late report being uploaded but where this is not possible, due to the late submission, the QI Practitioners should be notified of when to expect their QI Mentor response.

1. **Feedback model**

To help provide encouragement and support to our QI Practitioners Mentors should follow the QI Practitioner’s feedback model of “**What you liked…. what would be even better if….”** when feeding back.

1. **Interaction**

QI Practitioners and QI Mentors can decide which method suits them best for their interactions e.g. whether to include telephone and face-to-face catch ups as well as providing written feedback. It is expected that contact will be made at least once every month during the QI Programme.

1. **If there are issues**

If for any reason, you find you do not have the capacity to provide feedback after committing to be a QI Mentor please let the Community Planning team know as soon as possible so that they can ensure your QI Practitioner gets the support required.

If you feel your QI Practitioner may need a bit of extra support e.g., they are not taking feedback on board or it seems they are missing key learning points please let the Community Planning team know. This will support appropriate dialogue so that support can be tailored, and we can ensure all of those progressing through QI Practitioner Programme are applying the learning to protect the credibility of the programme.

Inactivity at any point needs to be challenged and flagged to the Community Planning team – there may be many reasons for it and at times means we need to go back and liaise directly with sponsors.

**8. Further information and support available**

The QI Mentoring Programme provides an opportunity to connect and seek support from other QI Mentors. You can also seek additional support from the Community Planning team.

1. **Monthly reports and supporting the improvement journey - What to look out for/feedback on**

**Reports 1 and 2**

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| **Content covered** | **What progress should have been made** | **Pitfalls to look for** |
| * Participants have attended Learning Sessions 1 & 2.
* They’ve had input about developing their project charter.
* They’ve seen tools to understand their system (forcefield, process mapping, cause and effect).
* They have had time to consider setting aims and developing their change theory/driver diagram.
* They have covered ground on measurement including building and interpreting run charts.
 | **Aim*** A clear and realistic improvement aim or reflections / work underway to refine their aim, building on learning from Learning Sessions 1 & 2.

**Understanding their System** * Reference to how they are using or intend to use technical tools to understand their system and what they’ve learned from this.

**Changes** * They should be referring to a developing change theory. They should consider if this should be articulated in a driver diagram.

**Measures** * Some specific measures may be listed (although we expect them to be getting a good understanding of their system/change theory before these become too developed).

**Planning** * They should be building an improvement project team and developing an action plan to deliver their project.
* They should also be reflecting on the human side of change.

**Clear next steps** **forward** * QI Practitioner’s should be focussing on change ideas and planning for PDSAs in preparation for Learning Session 3.

**Project charter** * In addition, all participants should be developing a charter that includes the rationale for their project.
 | **Project stage** * QI Practitioners over or under assessing where they are with their project – if the content does not match the score please enquire why.

**Aim*** Ensure their project is manageable. Encourage them to think about scope, perhaps focussing on one driver as a starting point, and scale e.g. starting with one class, one team etc.
* Sometimes there can be conflict between what we as faculty are advising in relation to scaling back/down and the pressure they sometimes feel from management to make progress with a big piece of work that is important within their organisation and it helps to be mindful of that.
* Encourage QI Practitioners to be clear on their target population.
* Please flag up if they do not have a clear project area identified, on a piece of work they will be able to influence, as they will struggle to apply the learning if this doesn’t happen quickly.
* Challenge QI Practitioner’s to articulate what better will look like. We often see aims stating “we will reduce this by X%” or “improve this by X%” but what would that outcome be? Quantifying their end goal will make their aim clearer and more relatable to their teams.
* Are your QI Practitioners clear on the rationale for their aim?
* QI Practitioner’s often incorporate aspects of their change theory into their aim, e.g. “we will increase the accuracy of child plans by implementing a standard operating procedure” – jumping to what they think the solution is rather than what they expect the outcome to be. Encourage them to stick to what they will make better in their aim and capturing their theory in their drivers e.g. Aim = 80% of child plans will be complete; Driver = standard operating procedure. It’s important that they recognise their perceived solution is just a theory at this stage that needs to be tested.

**Changes*** QI Practitioners sometimes confuse change ideas with tasks and activities e.g. listing things like process mapping, gathering data, etc, as change ideas. They have had learning on this but may need to be reminded.
* Look out for QI Practitioners listing changes that are more conceptual/driver level and encourage them to be specific, e.g. “train staff” often comes up as a change idea but what will they specifically test e.g. three-hour training session, one page guidance, buddy up session etc?

**Measures*** Please ensure QI Practitioners refer to specifics like ‘number of’ or ‘time to’ or ‘% of’ as at this stage QI Practitioners are sometimes vague and list concepts instead e.g. “staff confidence”.
* We are looking for them to state whether their measures are outcome, process or balancing so if they miss this ask for it to be included next month.
* Great if you could look out for them being too ambitious by either coming up with too many measures or selecting a measure where the data would be impractical to collect. Ideally, we are looking 1-2 outcome measures, 2-3 process and 1-2 balancing.
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**Reports 3 & 4**

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| **Content covered** | **What progress should have been made** | **Pitfalls to look for** |
| * Participants have attended Learning Sessions 3 & 4
* They have had input about how to develop a family of specific measures for an improvement project
* The importance of human factors in leading change.
* Covered planning for implementation and sustainability
 | **Aim** * Should be settled by this stage

**Changes*** Participants have been encouraged to develop Driver Diagram and they should share this with you. Clear change ideas should be listed in their report with testing underway on some of these
* By report 4 they should be ramping up their PDSA activity
* Where testing is progressed enough they should be indicating activity to support planning for implementation

**Measures*** These should now be more fully documented with at least outcome data being referred to (and represented in a chart where possible).

**Learning and Reflection*** content that is based on what they are learning about applying QI and ‘developing habits of an improver’. They should also be reflecting on the human side of change

**Project Stage** * by report 3 at least one PDSA should have been completed before Learning Session 4 when they will present this
* by report 4, testing should be underway, there should be evidence of learning from testing and use of data for improvement.
 | **Aim*** Guidance for Reports 1 and 2 is still relevant. If there is no clear aim at this stage it is cause for concern and should be escalated to the Community Planning Team and Cohort Leads.

**Changes*** Continue to look out for tasks being confused with change ideas and changes ideas that are more conceptual/driver level (see guidance for reports 1 /2).
* Encourage QI practitioners to use their understanding of the system, including reliability and human factors, to develop change ideas if they are not already doing so.
* Encourage team involvement in the identification of change ideas if there is no indication of this happening.
* QI Practitioners might be tempted to rush to implementation (you may get a feel from this in the changes and activity sections of the report)– encourage them to think through whether they have tested enough for this – is the change consistently doing what has been predicted in a variety of conditions? If not – are they really ready?

**Measures*** The importance of using data should be clearly reflected in reports and discussions. Lack of data should be challenged, and solutions sought to address this.

**Learning and reflection** * QI Practitioners may stick to what they are learning about their subject matter but we want to see how their thinking is changing – how are they finding the people side of change? what are they learning about developing a change theory, testing and measurement?
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