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# LEADERSHIP DEVELOPMENT PROGRAM PLUS

# LDP+

A GUIDE FOR  
FACILITATORS

**Section 2:**  
Technical  
Coaching  
Team Meetings



A Country-Led Process for  
Focusing Health Teams on  
Priority Health Results



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# LDP+

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FACILITATORS

**Section 2:**

Technical  
Coaching  
Team Meetings



A Country-Led Process for  
Focusing Health Teams on  
Priority Health Results

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Revised December 2016

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ISBN 978-0-9819616-1-3

Funding for this guide was provided by the United States Agency for International Development (USAID) under Cooperative Agreement AID-OAA-A-11-00015. The contents are the responsibility of the Leadership, Management, and Governance Project and do not necessarily reflect the views of USAID or the United States Government.



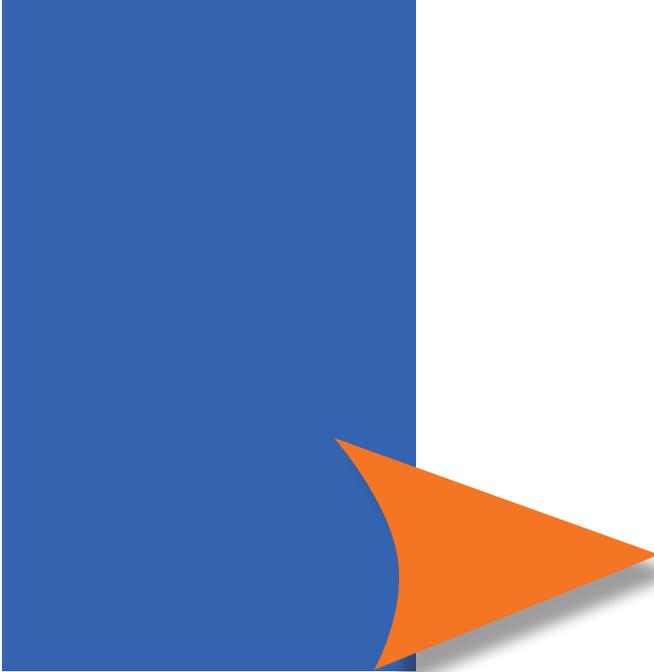
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# TECHNICAL COACHING TEAM MEETING I

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## FACILITATORS

Facilitation team, led by the Master Facilitator. May include LDP+ Champion and/or coaches.

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## PARTICIPANTS

- Members of the Technical Coaching Team: three to five individuals with expertise in the priority health area and in monitoring and evaluation

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## MEETING DESIGN

This is the first of three Technical Coaching Team meetings. It takes place after the Stakeholder Alignment Meeting (See Section I: Introduction, Alignment, and Scale-up), which members of the Technical Coaching Team attended.

This meeting is designed to prepare members of the Technical Coaching Team for their first coaching assignment with the Improvement Teams. They review the Challenge Model and practice developing a SMART result, with an emphasis on selecting and measuring indicators.

The meeting lasts for one day.

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## MEETING OBJECTIVES

- Confirm the LDP+ sequence and the responsibilities of the Technical Coaching Team.
- Give the Technical Coaching Team more familiarity with the Challenge Model.

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## MEETING DELIVERABLES

- Completed SMART Result Exercise

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## PREPARATION OF CONTENT

- Read the facilitator notes for this session.

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## PREPARATION OF MATERIALS

- Prepare copies of Handout #13: *Technical Coaching Team Meeting Evaluation Form*.
- Print and bind the LDP+ handouts as a separate document to distribute to participants. Invite participants to bring this booklet and their supplies to all subsequent workshops.
- Prepare materials required for each session.

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## MATERIALS

- Flipchart(s), easel, and paper
- Tape
- Colored markers
- Self-stick notes or note cards
- Half sheets of paper

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## PREPARED FLIPCHARTS

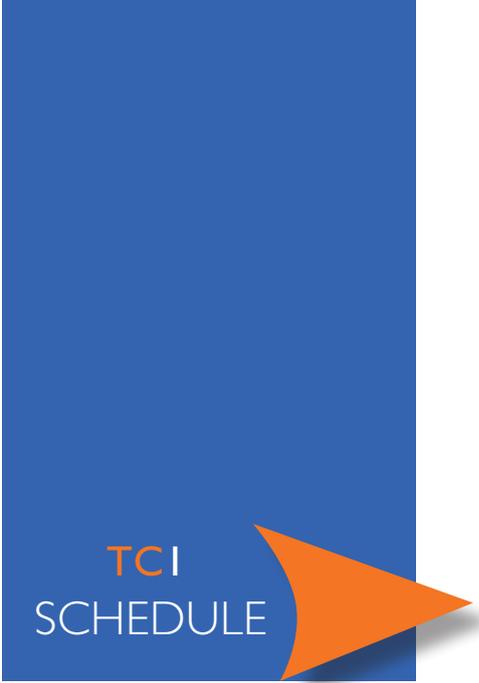
From the Stakeholder Alignment Meeting:

- Drawing of the filled-out Challenge Model
- Data on the selected priority health area:
  - The national and/or regional prevalence of specific health conditions or diseases
  - Government policies
  - 2–3 proven health interventions
  - 2–3 national/regional indicators

---

## HANDOUTS

- #1 *Responsibilities of the Technical Coaching Team*
- #2 *LDP+ Timeline and Deliverables*
- #3 *Improvement Team Meeting Form*
- #4 *The Challenge Model*
- #5 *Using the Challenge Model*
- #6 *Developing SMART Results*
- #7 *Results Levels and Sample Indicators*
- #8 *Elements of a Monitoring and Evaluation Plan*
- #9 *Numerators and Denominators for Indicators*
- #10 *Common Data Sources*
- #11 *SMART Result Exercise: The Monapo Improvement Team*
- #12 *Reference Sheet for Coaches*
- #13 *Technical Coaching Team Meeting Evaluation Form*



TCI  
SCHEDULE

## TECHNICAL COACHING TEAM MEETING I

- A. Welcome and Overview
  - B. Reviewing the Challenge Model and Priority Health Area
  - C. Coaching Improvement Teams on SMART Results
- Closing

## A. Welcome and Overview

*Through this discussion, participants understand the importance of coaching for a successful LDP+ process and the responsibilities of the Technical Coaching Team.*

- **DURATION** 30 minutes
- **MATERIALS**
  - ❑ Flipchart with the meeting objectives and agenda
  - ❑ Handouts: #1 *Responsibilities of the Technical Coaching Team*; #2 *LDP+ Timeline and Deliverables*; #3 *Improvement Team Meeting Form*
- **PROCESS:**

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**NOTE:** Distribute the entire handout workbook and instruct participants to bring their copy to all subsequent workshops.

---

### STEP 1. Explain the context, objectives, and agenda of this meeting (10 minutes)

Emphasize that this meeting builds on the Stakeholder Alignment Meeting () and help participants prepare to coach the Improvement Teams.

### STEP 2. Clarify the responsibilities of the Technical Coaching Team (20 minutes)

**DIRECT** participants to Handout #1 *Responsibilities of the Technical Coaching Team*. Read the handout together and discuss any questions or concerns that arise.

**DIRECT** participants to and review Handout #2 *LDP+ Timeline and Deliverables*. Point out that the first coaching assignments will take place in on-site Improvement Team meetings between Workshops #1 and #2.

**DIRECT** participants to Handout #3 *Improvement Team Meeting Form*. Discuss how the coaches might assist Improvement Teams in filling out the forms and how the information on the forms might help to identify areas of concern.

**SAY:** *You can see how many important activities you will be responsible for and how critical your coaching role is to the success of this LDP+ initiative.*

*The three Technical Coaching Team meetings will help you to be effective coaches and to address any challenges that arise as you work with your Improvement Teams.*

## B. Reviewing the Challenge Model and Priority Health Area

*This activity helps to review the indicators and proven health interventions agreed by the stakeholders.*

- **DURATION** 30 minutes
- **MATERIALS**
  - ❑ Prepared flipcharts (from the Stakeholder Alignment Meeting): Drawing of the Challenge Model and national/regional data on the selected priority health area
  - ❑ Handouts: #4 *The Challenge Model*; #5 *Using the Challenge Model*
- **PROCESS:**

### STEP 1. Review the steps of the Challenge Model (5 minutes)

**POINT** out the steps on the Challenge Model flipchart from the Stakeholder Alignment Meeting.

Have participants review Handout #4 *The Challenge Model* and Handout #5 *Using the Challenge Model*, from the Stakeholder Alignment Meeting.

**SAY:** *In Workshop #1, the participants will be introduced to all of the steps of the Challenge Model.*

*They will then work in their Improvement Teams to carry out the first four steps:*

- *reviewing the priority health area*
- *creating a shared vision*
- *assessing the current situation*
- *agreeing on a measurable result.*

*When you meet with them after Workshop #1, your task will be to help them review their work on these four steps.*

*You may find that you need to go over the Challenge Model again to be sure that they understand the steps.*

## STEP 2. Review information about the priority health area (25 minutes)

Briefly go over the flipcharts from the Stakeholder Alignment Meeting about the priority health area.

**SAY:** *In Workshop #1, the Improvement Teams will apply this information to their own current situations.*

*The priority health area indicators will help them develop indicators for their measurable result, and the proven interventions may generate ideas for the priority actions in their Action Plans.*

*In your meetings with them after Workshop #1, you may find it helpful to review some of these priority health area indicators and interventions that were discussed during the Stakeholder Alignment Meeting.*

**ASK:** *Does anyone have a question about the information on these flipcharts?*

*Does anyone want to add to or modify the proven interventions?*

Answer questions and make any suggested additions to the interventions.

## C. Coaching Improvement Teams on SMART Results

*This exercise helps build skills in analyzing a given result, explaining why it is or is not SMART, and giving suggestions to make it SMARTer.*

- **DURATION** 2 hours, 15 minutes
- **MATERIALS**
  - ▣ Handouts: #6 *Developing SMART Results*; #7 *Results Levels and Sample Indicators*; #8 *Elements of a Monitoring and Evaluation Plan*; #9 *Numerators and Denominators for Indicators*; #10 *Common Data Sources*; #11 *SMART Result Exercise: The Monapo Improvement Team*; #12 *Reference Sheet for Coaches*
- **PROCESS:**

### STEP 1. Focusing on the measurable result (10 minutes)

**POINT** out that LDP+ facilitators and coaches have found that some Improvement Teams have difficulty making their results SMART (Step 4 in the Challenge Model).

Ask participants to refer to Handout #6 *Developing SMART Results*, from the Stakeholder Alignment Meeting. (Have extra copies on hand in case some participants do not have theirs.)

**SAY:** *When you review the Challenge Model with your Improvement Teams after Workshop #1, you can help them make sure that their desired measurable result statement meets all of the SMART criteria.*

*They may need to modify the result statement several times to make it really SMART.*

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**NOTE:** In some cases, participants may be familiar with A and R instead referring to Achievable and Relevant, but the meaning is the same.

---

### STEP 2. Selecting an indicator for the measurable result (20 minutes)

**SAY:** *Improvement Teams often need help getting started with the S for “specific”—stating their result in clear terms that are easy to understand.*

*To be specific, their result needs to contain an indicator, something that can be measured over time. An indicator is like a road sign — a milestone along a road.*

*When they measure the indicator, it shows whether they are on the right road, how far they have gone, and how far they still have to go to reach their destination — their measurable result.*

*The indicator should answer the question, “What will we see or hear that tells us whether or not we achieved our measurable result?”*

**SAY:** *The measurable result should have no more than one or two indicators. More indicators would make monitoring progress and evaluating results complicated, difficult, and perhaps costly.*

*You now have a chance to look at some handouts that the Improvement Teams will use to develop their indicators during Workshop #1. These handouts will also be useful references for you as coaches helping the Improvement Teams modify the indicators after Workshop #1.*

### STEP 3. Choosing an indicator at the output or outcome level (30 minutes)

**SAY:** *You are now familiar with some of the indicators for the priority health area in the country. These are the indicators related to a national program.*

*When your Improvement Teams develop indicators for their measurable results, they will select an indicator that applies to their facility or community. It may be an indicator that is used at the regional/national level (such as the viral load testing rate among babies born to HIV-positive pregnant women), or it may be an indicator at the facility level that will contribute to a higher-level priority health area indicator (such as the number of HIV-positive pregnant women receiving ART at a particular facility).*

**DIRECT** participants to Handout #7 *Results Levels and Sample Indicators*. Review the handout with participants and lead a discussion of the indicator levels and examples on the handout. Ask participants for other examples based on their own experience.

**DRAW ATTENTION** to the reasons for choosing output and/or outcome indicators stated at the top of the handout:

- *An impact indicator requires more time and more interventions than a six to eight-month project can achieve.*
- *Input and process indicators are too limited and activity-related to show a real public health result.*

### STEP 4. A monitoring and evaluation plan (45 minutes)

Remind participants that if the result is to be measurable (the M in SMART), the Improvement Teams will need to track progress for their indicator month by month, if possible, from the start to the end of their LDP+ improvement project.

**POINT OUT** the need for a plan to enable them to monitor their progress and evaluate their results. **DIRECT** participants to Handout #8 *Elements of a Monitoring and Evaluation Plan*, and review the elements together.

Explain that many Improvement Teams have needed coaching to fully understand the baseline and the goal.

**SAY:** *The measurable result must state a baseline value for the indicator at the beginning of the LDP+ improvement project, before activities begin. The result must also state the goal, the value of the indicator that the Improvement Team is aiming for at the end of the LDP+ improvement project.*

*Gathering baseline data provides the starting point for tracking changes in an indicator over the life of an improvement project.*

Draw participants' attention to the second element on the handout, the indicator definition. Explain that the Improvement Teams will have to set a numerator and denominator if they are to measure the amount of change in their indicator from baseline to goal.

**DIRECT** participants to and review Handout #9 *Numerators and Denominators for Indicators* and Handout #10 *Common Data Sources*.

Remind participants that the Improvement Teams may not have immediate access to the relevant data sources during Workshop #1, but they can obtain accurate data when they return to their facilities.

## STEP 5. Complete the SMART Result Exercise (30 minutes)

**DIRECT** participants to Handout #11 *SMART Result Exercise*, and read the instructions together.

**SAY:** *Here's your chance to practice coaching an Improvement Team to make their result statement SMARTer.*

**ASK:** *What feedback would you give your Improvement Team if they came back from Workshop #1 with a result like this one?*

Ask participants to work on their own to suggest revisions to the result in the exercise. They should use handout #6 *Developing SMART Results* to guide them.

After they complete their individual work, have them discuss their responses, either in plenary or in small groups, depending on the number of participants.

Encourage participants to recognize that they can assist Improvement Teams to use the *Developing SMART Results* handout just as they did during this exercise. Review Handout #12 *Reference Sheet for Coaches* to make sure participants understand the logic of the coaching questions around a result to make it SMARTer.

## Closing

*This discussion will reinforce participants' learning and hear their reactions to this first meeting.*

- **DURATION** 30 minutes
- **MATERIALS**  Handout: #13 *Technical Coaching Team Meeting Evaluation Form*
- **PROCESS:**

### STEP 1. Summarize learning and reactions to this meeting (15 minutes)

**ASK:** *What have you learned today about the LDP+?*

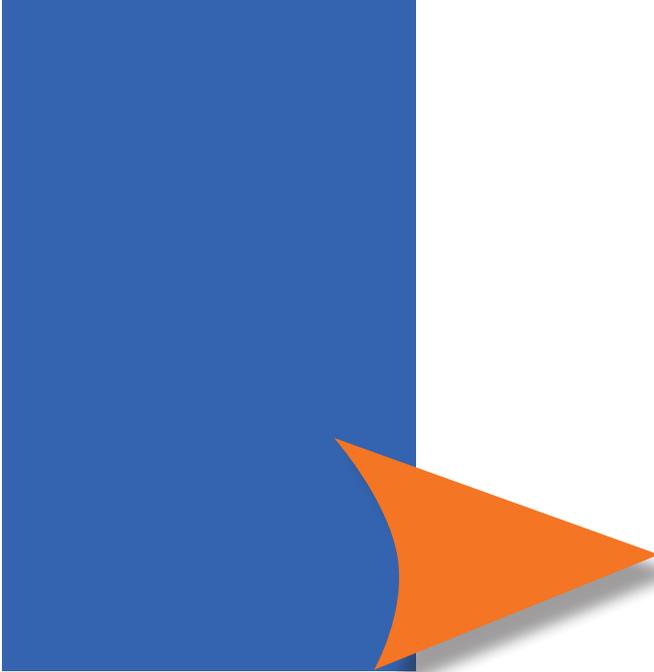
*What have you learned about your responsibilities as coaches of the Improvement Teams? How are you feeling about taking on those responsibilities?*

Encourage open discussion of any concerns about coaching content or skills.

Reassure participants that they will work on both content and skills in Technical Coaching Team Meeting #2. **SET** the date, time, and location of that meeting.

### STEP 2. Evaluate the meeting (15 minutes)

**DISTRIBUTE** copies of Handout #13 *Technical Coaching Team Meeting Evaluation Form* and give participants 15 minutes to complete it.



# TECHNICAL COACHING TEAM MEETING 2

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## FACILITATORS

Facilitation team, led by the Master Facilitator. May include LDP+ Champion and/or coaches.

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## PARTICIPANTS

- Members of the Technical Coaching Team who have participated in the Stakeholders Alignment Meeting, Technical Coaching Team Meeting # 1, and Workshop #1

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## MEETING DESIGN

This meeting takes place after Workshop #1 (See Section 3: Workshops). During that workshop, the Improvement Teams will have covered: the leading, managing, and governing practices; work group climate; the Challenge Model; the priority health area; priority interventions; M&E; planning and scanning. By participating in Workshop #1, the members of the Technical Coaching Team will have been able to review these topics, to observe an expert facilitator handling the topics, and to see how the Improvement Teams work together.

This meeting is designed to hone the participants' coaching skills and reinforce their grasp of the first four steps in the Challenge Model so that they may start coaching the Improvement Teams.

The meeting lasts one day.

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## MEETING OBJECTIVES

- Introduce the Technical Coaching Team to coaching principles.
- Assess the coaching skills of the members of the Technical Coaching Team.
- Practice coaching Improvement Teams around the first part of the Challenge Model: priority health area, vision, current situation, and measurable result.

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## MEETING DELIVERABLES

- Individual assessments of coaching skills
- Improved skills in coaching Improvement Teams around their Challenge Models

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## PREPARATION OF CONTENT

- Read the facilitator notes for this session.

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## PREPARATION OF MATERIALS

- Prepare copies of Handout #13: *Technical Coaching Team Meeting Evaluation Form*.
- Collect the Challenge Models the groups developed during Workshop #1 and have them ready for participants to use to practice providing feedback.

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## MATERIALS

- Flipchart(s), easel, and paper
- Tape
- Colored markers

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## PREPARED FLIPCHARTS

- Meeting objectives and agenda
- OALFA skills

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## HANDOUTS

- #1 *Responsibilities of the Technical Coaching Team*
- #13 *Technical Coaching Team Meeting Evaluation Form*
- #14 *Coaching Principles*
- #15 *Three-Person Coaching Exercise*
- #16 *OALFA Coaching Skills Self-Assessment*
- #17 *Tips for Improving OALFA Coaching Skills*
- #18 *Reviewing the First Steps in Improvement Teams' Challenge Models*
- #19 *Feedback on Coaching Practice for the First Steps in the Challenge Model*



TC2  
SCHEDULE

## TECHNICAL COACHING TEAM MEETING 2

- A. Welcome, Objectives, and Expectations
- B. Learning and Practicing Coaching Skills
- C. Assessing and Strengthening Coaching Skills
- D. Applying Coaching Skills to the Challenge Model

Closing

## A. Welcome, Objectives, and Expectations

*The meeting objectives are explained and related to participants' expectations.*

- **DURATION** 30 minutes
- **MATERIALS**  Prepared flipchart: Meeting Objectives and Agenda
- **PROCESS:**

### STEP 1. Set the stage for the meeting (15 minutes)

**GREET** participants.

Explain the context of this meeting as a follow-up to Technical Coaching Team Meeting #1 and Workshop #1, with further preparation for their first coaching sessions.

**USE** the prepared flipchart, "Meeting Objectives and Agenda," to present the objectives and agenda of the meeting.

**POINT OUT** that the participants will begin by building coaching skills and then practice using those skills to coach Improvement Teams in the first four steps of the Challenge Model.

### STEP 2. Match expectations to the objectives (15 minutes)

**ASK:** *After this first coaching experience, what did you learn?  
What concerns and questions came up for you?*

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**NOTE:** With larger groups, have participants first discuss in pairs before reporting in plenary. With smaller groups, take responses in plenary.

---

**WRITE** participants' responses on a flipchart.

Summarize the responses and relate them to the meeting objectives and agenda.

**POINT OUT** the ways in which this meeting can meet their expectations and help to address their concerns.

## B. Learning and Practicing Coaching Skills

*This activity emphasizes the importance of coaching for the LDP+ and introduces coaching principles and practices.*

- **DURATION** 1 hour 45 minutes
- **MATERIALS**
  - ▣ Handouts: #1 Responsibilities of the Technical Coaching Team; #14 Coaching Principles; #15 Three-Person Coaching Exercise
- **PROCESS:**

### STEP 1. Discuss the role and importance of coaching in the LDP+ (15 minutes)

**DIRECT** participants to Handout #1 *Responsibilities of the Technical Coaching Team*.

Have participants scan the list of responsibilities and read aloud all those that involve coaching.

**SAY:** *We have just seen how important coaching skills are for your work with the Improvement Teams and for the success of the LDP+.*

*Now you will have the chance to explore the principles of effective coaching, to put the principles into practice in a real-life exercise, and to get feedback from your colleagues on your coaching skills.*

### STEP 2. Explore coaching principles (30 minutes)

**DIRECT** participants to Handout #14 *Coaching Principles*.

**READ ALOUD** the definition at the top of the handout: *Coaching is enabling others to reflect on their commitments and find new ways to achieve their intended results.*

Check to see if this definition matches participants' views of what coaching is. Acknowledge appropriate additions to the definition.

**ASK:** *Have you ever experienced this kind of coaching — in school, on a sports team, in your profession?*

*How did it make you feel? In what ways did it help you make changes in your actions?*

Encourage participants to share stories of successful coaching experiences, emphasizing behavioral changes as well as good feelings.

Have participants read the principles of coaching from the handout. Have them relate some of the principles to the stories they have just heard, or to other personal coaching experiences.

### STEP 3. Carry out and process a coaching conversation (60 minutes)

**DIRECT** participants to Handout #15 *Three-Person Coaching Exercise*. Explain that all participants will now have the opportunity to play three roles: to coach, to be coached, and to observe and give feedback on the coaching experience.

Read the handout together and clarify any areas of confusion.

Ask participants to think about a challenging situation that they are facing at work.

**DIVIDE** the participants into groups of three and assign each person in the group a letter:

- Person A for the coach
- Person B for the person being coached
- Person C for the observer.

(If the group does not divide evenly into groups of three, two people can be observers.)

Give instructions for the exercise.

**SAY:** *Each round of this exercise will take no more than 15 minutes.*

*For 10 minutes, Person B will describe the difficult situation s/he is facing at work and Person A will act as a coach, asking questions, not providing solutions. See the handout for suggestions on the types of questions coaches may ask.*

*Person C will have 5 minutes to give Person A feedback.*

Limit each round to 15 minutes. Inform participants when the time is up and have them switch roles, so that every participant gets to play all three roles.

After the three rounds, reconvene the participants. Lead a discussion on how the process went and what they experienced in each of the roles.

## C. Assessing and Strengthening Coaching Skills

Through this exercise, participants recognize strengths and weaknesses in coaching skills and begin to work on improving skills.

- **DURATION** 2 hours
- **MATERIALS**
  - ❑ Prepared flipchart: OALFA skills:
    - **O**bserve
    - **A**sk good questions
    - **L**isten attentively
    - Provide **F**eedback
    - Come to **A**greement
  - ❑ Handouts: #16 *OALFA Coaching Skills Self-Assessment*; #17 *Tips for Improving OALFA Coaching Skills*
- **PROCESS:**

### STEP I. Assess basic coaching skills (60 minutes)

**SHOW** the prepared flipchart with the OALFA skills.

**SAY:** *Five skills are essential to put coaching principles into action. We use the acronym “OALFA” to remember these skills:*

- **O**bserve
- **A**sk good questions
- **L**isten attentively
- Provide **F**eedback
- Come to **A**greement

**POINT OUT** that even the most experienced coaches have strengths and areas that can be improved. Explain that the LDP+ offers a tool to help coaches learn more about their coaching skills—those that are strongest and those that they would like to strengthen.

**DIRECT** participants to Handout #16 *OALFA Coaching Skills Self-Assessment*. Read the instructions aloud and answer any questions about the scoring.

Have participants read aloud the components of the five skills.

Encourage participants to ask questions, and answer the questions to clarify any areas of confusion.

Give participants 30 minutes to complete and score their self-assessments. Ask for any reactions to the exercise (e.g., new perceptions, positive or negative surprises, effects on confidence).

## STEP 2. Choose and share ways to improve coaching skills (60 minutes)

**SAY:** *The OALFA assessment has given you a chance to score yourself in the five essential coaching skills.*

*Now you can begin to improve your skills with tips from successful coaches.*

**DIRECT** participants to Handout #17 *Tips for Improving OALFA Coaching Skills*. Have participants read the tips aloud.

Encourage participants to find links between these tips and the principles in the handout, *Coaching Principles*.

Ask participants to work individually to choose three tips that they feel would improve the coaching skills on which they scored lowest.

Have them share their responses with one other person and explain how they think those tips will help them coach their Improvement Teams.

## D. Applying Coaching Skills to the Challenge Model

*This activity allows coaches to prepare for their first coaching sessions by practicing coaching the entire Improvement Team on real Challenge Models.*

- **DURATION** 2 hours
- **MATERIALS**
  - Handouts: *Improvement Teams' Challenge Models* (collected at the end of Workshop #1, with the first four steps completed); #18 *Reviewing the First Steps in Improvement Teams' Challenge Models*; #19 *Feedback on Coaching Practice for the First Steps in the Challenge Model*
- **PROCESS:**

### STEP 1. Review Challenge Model from Workshop #1 (15 minutes)

**CHOOSE** one Challenge Model developed during Workshop #1 (handout, *Improvement Teams' Challenge Models*.) **DISTRIBUTE** copies of that Challenge Model and direct participants to Handout #18 *Reviewing the First Steps in Improvement Teams' Challenge Models*.

Ask participants to individually consider the Challenge Model in light of the questions in the *Reviewing the First Steps* handout. Have them share their views and any suggestions they would give an Improvement Team.

### STEP 2. Explain how to practice coaching Improvement Teams in a role play (5 minutes)

**SAY:** *Each of you will now have the chance to practice coaching your real Improvement Teams and to get valuable feedback on your coaching skills from your colleagues.*

**DIRECT** participants to Handout #19 *Feedback on Coaching Practice for the First Steps in the Challenge Model*. Have participants read the handout aloud. Answer any questions they may have.

**ASSIGN ROLES** for the coaching practice.

- One participant to play the role of the **COACH**.
- One or two participants to play the role of **OBSERVERS**.
- The rest of the group play the role of the Improvement Team members – the “**COACHEES**.”

### STEP 3. Role play to practice coaching and Improvement Team on their Challenge Model (1 hour 40 minutes)

Ask the coach to demonstrate how s/he might use coaching skills to help the Improvement Team strengthen its Challenge Model, based on the comments from the previous exercise.

After 10 minutes, ask the observers to give the coach feedback, based on the handout, *Feedback on Coaching Practice for the First Steps in the Challenge Model*.

After the first person has practiced coaching the Improvement Team and receiving feedback, change roles, assigning a new coach and new observers. You can repeat the process 5 times (20 minutes each round including feedback) until 5 participants have had the opportunity to play the coach role and receive feedback.

In plenary, ask participants to share their reactions to and learnings from the coaching practice, as both coaches and people being coached.

## Closing Technical Coaching Team Meeting #2

*This session wraps up the meeting and determines next steps.*

- **DURATION** 45 minutes
- **MATERIALS**  Handout: #13 *Technical Coaching Team Meeting Evaluation Form*
- **PROCESS:**

### STEP 1. Summarize learnings and reactions to this meeting (15 minutes)

**ASK:** *What have you learned today about coaching? How are you feeling about taking on your responsibilities as a coach?*

Encourage open discussion of any concerns about the Challenge Model content or coaching skills. Invite questions and respond to them.

### STEP 2. Plan next steps (15 minutes)

Create a schedule for coaching, so everyone knows who goes where and when.

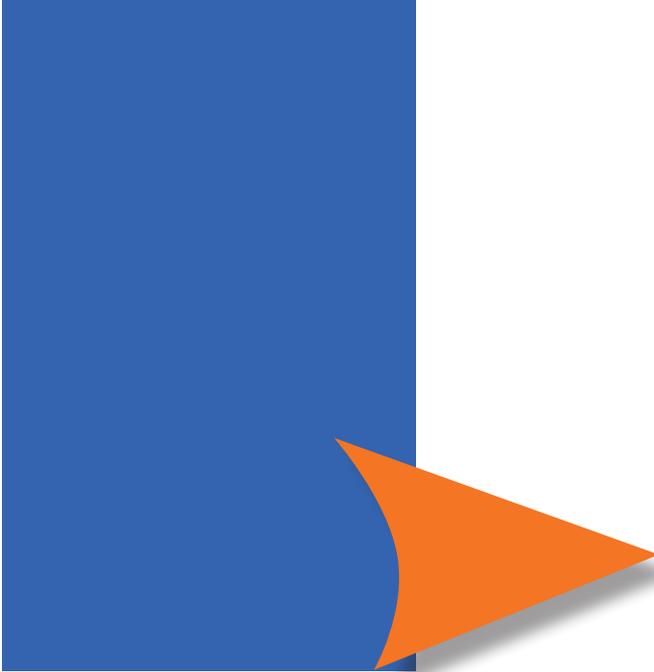
Remind participants that they will work on the next part of the Challenge Model in Technical Coaching Team Meeting #3, after Workshop #2.

**SET** the date, time, and location of that meeting.

### STEP 3. Evaluate the meeting (15 minutes)

**DISTRIBUTE** copies of Handout #13 *Technical Coaching Team Meeting Evaluation Form* and give participants 15 minutes to complete it.





# TECHNICAL COACHING TEAM MEETING 3

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## FACILITATORS

Facilitation team, led by the Master Facilitator. May include LDP+ Champion and/or coaches.

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## PARTICIPANTS

- Members of the Technical Coaching Team who have participated in the Stakeholder Alignment Meeting, Technical Coaching Team Meetings #1 and #2, and Workshops #1 and #2

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## MEETING DESIGN

This meeting takes place after Workshop #2. During that workshop, the Technical Coaching Team will have joined their Improvement Teams in working on the Challenge Model: identifying obstacles and root causes, and developing an Action Plan.

In this third and final meeting, the Technical Coaching Team will cover these steps and focus on Step 8: monitoring and evaluating the implementation of the Action Plan. They will review the monitoring and evaluation (M&E) components and practice coaching their Improvement Teams in monitoring, evaluating, and reporting. This will help the Improvement Teams prepare for the Shared Learning Session at the start of Workshop #3.

The meeting lasts one day.

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## MEETING OBJECTIVES

- Review experiences coaching the Improvement Teams.
- Practice coaching Improvement Teams in completing the second part of the Challenge Model, with an emphasis on monitoring, evaluating, and reporting.

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## MEETING DELIVERABLES

- Improved skills in coaching the last steps of the Challenge Model
- Demonstrated grasp of the components of the LDP+ M&E process: indicators, data sources, data collection process, reporting requirements, and forms

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## PREPARATION OF CONTENT

- Read the facilitator notes for this meeting.

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## PREPARATION OF MATERIALS

- Collect and photograph the Challenge Models and Action Plans the Improvement Teams developed during Workshop #2, if you have not already done so.
- Make copies of all of the Challenge Models and Action Plans from Workshop #2 for each participant.
- Prepare copies of Handout #13: *Technical Coaching Team Meeting Evaluation Form*.

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## MATERIALS

- Flipchart(s), easel, and paper
- Tape
- Colored markers

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## PREPARED FLIPCHARTS

- Meeting objectives and agenda

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## HANDOUTS

- #8 *Elements of a Monitoring and Evaluation Plan*
- #13 *Technical Coaching Team Meeting Evaluation Form*
- #17 *Tips for Improving OALFA Coaching Skills*
- #20 *Challenge Model Example*
- #21 *Action Plan Example*
- #22 *Reviewing the Last Steps of the Improvement Teams' Challenge Model*
- #23 *Feedback on Coaching Practice for the Last Steps of the Challenge Model*
- #24 *LDP+ Reporting Form*
- #25 *Monitoring and Evaluation Plan*
- #26 *Monitoring and Evaluation Plan Example*
- #27 *Evaluation Form (LDP+ Reporting Form Annex)*
- #28 *Coaching Notes Between Workshops #3 and #4*



TC3  
SCHEDULE

## TECHNICAL COACHING TEAM MEETING 3

- A. Welcome, Objectives, and Expectations
- B. Reviewing the Coaching Experience
- C. Coaching on Three More Steps of the Challenge Model
- D. Coaching on the Last Step of the Challenge Model: M&E

Closing

## A. Welcome, Objectives, and Expectations

*The meeting objectives are explained and related to participants' expectations.*

- **DURATION** 30 minutes
- **MATERIALS**
  - ▢ Prepared flipchart: Meeting Objectives and Agenda
- **PROCESS:**

### STEP 1. Set the stage for the meeting (15 minutes)

**GREET** participants.

Explain the context of this meeting as a follow-up to Technical Coaching Team Meeting #2 and Workshop #2.

**USE** the prepared flipchart, "Meeting Objectives and Agenda," to present the objectives and agenda of the meeting.

**POINT OUT** that the participants will practice using their coaching skills to coach Improvement Teams in completing the last steps of the Challenge Model, including finalizing a monitoring and evaluating plan for their LDP+ improvement project.

### STEP 2. Match expectations to the objectives (15 minutes)

**ASK:** *What do you expect to get out of this meeting?*

*After meeting with your Improvement Teams and attending Workshop #2, what concerns do you have about your coaching role?*

**JOT DOWN** participants' responses on a flipchart.

Summarize the responses and relate them to the meeting objectives and agenda.

**POINT OUT** the ways in which this meeting can meet their expectations and help to address their concerns.

## B. Reviewing the Coaching Experience

*This activity encourages participants to acknowledge their strengths and weaknesses as coaches.*

- **DURATION** 1 hour 30 minutes
- **MATERIALS**
  - ▣ Handouts: #17 *Tips for Improving OALFA Coaching Skills*; #20 *Challenge Model Example*; #21 *Action Plan Example*
- **PROCESS:**

### STEP 1. Review coaching principles and skills (10 minutes)

Remind participants of the basic coaching principles and the skills needed to conduct a productive coaching conversation.

Emphasize the importance of their coaching role for the success of the Improvement Teams.

### STEP 2. Share coaching experiences (20 minutes)

Invite participants to **FORM PAIRS** and **SHARE** their experiences coaching their Improvement Teams.

Have them **JOT DOWN** notes on: 1) coaching achievements; and 2) difficulties they have encountered in their coaching role.

### STEP 3. Discuss the coaching experiences (30 minutes)

In plenary, ask participants to describe the coaching achievements they shared in pairs. Acknowledge the good work they have done so far.

Ask them to **SHARE** their coaching difficulties.

Encourage them to serve as resources to each other, suggesting ways of overcoming these difficulties.

Make additional suggestions from your own knowledge and experience and from Handout #17 *Tips for Improving OALFA Coaching Skills*.

## STEP 4. Prepare for coaching on the rest of the Challenge Model (30 minutes)

Remind participants that their next coaching task will focus on the rest of the Challenge Model, the Action Plan, and the M&E plan.

Ask for any questions on the last steps of the Challenge Model or the Action Plans that arose in Workshop #2.

Together, **REVIEW** Handout #20 *Challenge Model Example* and Handout #21 *Action Plan Example*. **REFER** to these examples to answer participants' questions.

## C. Coaching on Three More Steps of the Challenge Model

*This activity helps participants prepare to coach Improvement Teams on Steps 5, 6, and 7 of the Challenge Model: obstacles and root causes, finalizing the challenge statement, priority actions, and Action Plans.*

- **DURATION** 2 hours 15 minutes (for three rounds of practice)
- **MATERIALS**
  - Handouts: *Challenge Models and Action Plans (from Workshop #2); #22 Reviewing the Last Steps of the Improvement Teams' Challenge Model; #23 Feedback on Coaching Practice for the Last Steps of the Challenge Model*
- **PROCESS:**

### STEP 1. Prepare to coach an Improvement Team on their Challenge Model (30 minutes)

This activity may be carried out in one group or two, depending on the number of participants.

**DISTRIBUTE** the handouts — one *Challenge Model* and one *Action Plan from Workshop #2* — to each group.

Also **DIRECT** participants to Handout *#22 Reviewing the Last Steps of Improvement Teams' Challenge Models*.

**READ** through the first three items together: *The Obstacles and Root Causes, The Key Challenge, and The Action Plan*.

Explain that we will look at the last item—the *Monitoring and Evaluation Plan*—separately as the next activity.

Ask participants to individually consider their group's *Challenge Model* and *Action Plan* in light of the questions on Handout *#22 Reviewing the Last Steps of the Improvement Teams' Challenge Models*.

Have them share their views and any suggestions they would give an *Improvement Team*.

## STEP 2. Practice coaching on the next steps in the Challenge Model (30 minutes)

As in Technical Coaching Team Meeting #2, assign roles for the coaching practice.

- The participant who is working with this Improvement Team is the **COACH**.
- One other participant is the team member being coached—the “**COACHEE**.”
- The rest of the group is **OBSERVERS**.

**DIRECT** participants to Handout #23 *Feedback on Coaching Practice for the Last Steps of the Challenge Model*.

- Have participants read the handout aloud, again leaving the last item, monitoring and evaluation, for the next activity.
- Point out that the observers can use this handout when giving feedback to the coach. Answer any questions they may have.
- Ask the coach to demonstrate how s/he might use coaching skills to help the Improvement Team strengthen the obstacles/root causes, challenge statement, and priority actions in the Challenge Model, (based on the comments from the previous exercise).

After 20 minutes, ask the **observers** to refer to the handout #23 *Feedback on Coaching Practice for the Last Steps of the Challenge Model* in giving the coach feedback.

## STEP 3. Repeat Steps 1 and 2 (30 minutes for each exercise)

Repeat the reviewing/coaching/feedback sequence until every participant has had the chance to practice coaching, being coached, and observing.

## STEP 4. Share reactions (15 minutes)

In plenary, ask participants to describe their reactions to and learnings from the coaching practice, as both coaches and people being coached.

## D. Coaching on the Last Step of the Challenge Model: Monitoring Progress and Evaluating Results

*This exercise enables participants to coach Improvement Teams on the LDP+ monitoring and evaluation process, including completing the LDP+ Reporting Form and Evaluation Form.*

➤ **DURATION** 2 hours

➤ **MATERIALS** □ Handouts: #22 *Reviewing the Last Steps of the Improvement Teams' Challenge Model*; #23 *Feedback on Coaching Practice for the Last Steps of the Challenge Model*; #8 *Elements of a Monitoring and Evaluation Plan*; #24 *LDP+ Reporting Form*; #25 *Monitoring and Evaluation Plan*; #26 *Monitoring and Evaluation Plan Example*; #27 *Evaluation Form (LDP+ Reporting Form Annex)*

➤ **PROCESS:**

**STEP 1.** Discuss the essential elements of monitoring and evaluating the LDP+ improvement project (30 minutes)

**POINT OUT** that it is time to practice coaching the last step in the Challenge Model: implementing, monitoring, and evaluating.

Read together the last item on Handout #22 *Reviewing the Last Steps of the Improvement Teams' Challenge Model* and Handout #23 *Feedback on Coaching Practice for the Last Steps of the Challenge Model*.

**DIRECT** participants to Handout #8 *Elements of a Monitoring and Evaluation Plan*.

Read the handout together and use it as the tool for discussing the LDP+ monitoring process and clarifying the elements.

**SAY:** *After the Improvement Teams have implemented their Action Plans and monitored their progress:*

*They will summarize the experience on two important forms: the LDP+ Reporting Form and the Evaluation Form.*

*The Improvement Teams will use these two forms as the basis for sharing their results and their learning:*

- *with colleagues in their workplaces,*
- *with other Improvement Teams,*
- *with the coaches of all the Improvement Teams,*
- *with the members of the Governing Body.*

*You, as coaches, have a major responsibility for helping your Improvement Teams to fill out the forms accurately and completely.*

*Let's practice using the Challenge Models you have already worked on today.*

## STEP 2. Practice filling out the LDP+ Reporting Form (30 minutes)

**DIRECT** participants to Handout #24 LDP+ Reporting Form, Handout #25 Monitoring and Evaluation Plan and Handout #26 Monitoring and Evaluation Plan Example.

**ASSIGN** participants to one or more of the Challenge Models they practiced on in the previous activity. They may work in pairs or small groups, depending on the number of participants.

Ask them to **COMPLETE** Handout #24 LDP+ Reporting Form and Handout #25 Monitoring and Evaluation Plan, devoting most of their time to filling out Handout #25.

They should be able to find the **indicator, numerator** and **denominator, baseline,** and **target/goal** stated in the measurable result.

They can use their knowledge and experience to suggest likely data sources, data collection frequency, and responsible parties.

## STEP 3. Repeat Step 2 (30 minutes)

If there is time and you think the participants would benefit from additional practice, assign a different Challenge Model and have participants repeat the process.

## STEP 4. Become familiar with the Evaluation Form (15 minutes)

Together, read the items in the handout, *Evaluation Form*.

**ASK:** *The Improvement Teams you are coaching will be asked to fill in this form after they have finished their improvement projects.*

*Based on what you have already observed in the Improvement Teams you coach, can you share examples about the challenges they are facing, how they overcame them, and how they are applying leading and managing?*

**GATHER RESPONSES** and ask for anecdotal evidence.

## STEP 5. Share reactions (15 minutes)

In plenary, ask participants to describe their reactions to and learnings from this activity.

## Closing Technical Coaching Team Meeting #3

*This session wraps up the meeting and determines next steps.*

- **DURATION** 45 minutes
- **MATERIALS**  Handouts: #13 *Technical Coaching Team Meeting Evaluation Form*; #28 *Coaching Notes Between Workshops #3 and #4*
- **PROCESS:**

### STEP 1. Summarize learnings and reactions to this meeting (15 minutes)

**DIVIDE** the group into pairs to talk about the day's activities.

**ASK:** *What have you learned about coaching your Improvement Team on completing the Challenge Model and monitoring and evaluation plan?*

*How are you feeling about your coaching responsibilities?*

Encourage open discussion of any concerns about the Challenge Model and M&E Plan content or coaching skills. Invite questions and respond to them.

### STEP 2. Plan next steps (15 minutes)

Create a schedule for coaching, so everyone knows who goes where and when.

Remind participants that before Workshop #3, they will be coaching their Improvement Teams to:

- **COMPLETE** their Challenge Models, including their Action Plan and M&E plan.
- **PREPARE** for their presentations in Workshop #3.
- **PREPARE** the *LDP+ Reporting Form* and the *Evaluation Form*.

Explain to participants this will be the last Technical Coaching Meeting, but between workshops 3 and 4 they are expected to continue supporting the Improvement Teams to implement their action plans and prepare for Workshop 4.

Explain that they have instructions to facilitate a meeting with their Improvement Teams in Handout #28 *Coaching Notes Between Workshops #3 and #4*.

### STEP 3. Evaluate the meeting (15 minutes)

**DISTRIBUTE** copies of Handout #13 *Technical Coaching Team Meeting Evaluation Form* and give participants 15 minutes to complete it.  
Allow 15 minutes for participants to complete it.

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## ABOUT MANAGEMENT SCIENCES FOR HEALTH

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