

B. CHECKLIST: Quality Improvement Team Coach Levels (Revised October 9, 2023)

Note: Please download the templates in this checklist before filling them out.

Additional resources: A. Credentialing Description B. Credentialing Checklist C. List of materials for application D. Application

CIT	Novice 1	Novice 2	Intermediate	Senior Level 1	Senior Level 2
<input type="checkbox"/> Current participant in the Team Coaching Program .	<input type="checkbox"/> Complete Microsystem team coach program. <input type="checkbox"/> Coach <i>one</i> clinical or supporting microsystem for <i>5-12 months</i> . <input type="checkbox"/> Provide resume or CV.	<input type="checkbox"/> Complete requirements for <i>Novice 1</i> . <input type="checkbox"/> Coach at least <i>one</i> clinical microsystem for <i>12-18 months</i> (as noted on application). <input type="checkbox"/> Participate as a partner in Co-Coaching (Novice/Intermediate or Novice/Novice) <input type="checkbox"/> Complete the a) Assessment and Development Tool including the Quality Improvement Assessment (QIA) <input type="checkbox"/> Create an individual b) Team Coach Development Action Plan for continued development -includes documented evidence of growth <i>including peer review and feedback from the team/leaders coached</i> (using: c) Coaching Evaluation by Coachee (IEHSS will send aggregate results to coach – email script here),	<input type="checkbox"/> Complete requirements for <i>Novice 2</i> , including update of templates A-G. <input type="checkbox"/> Coach <i>6 microsystems</i> or more and <i>1 mesosystem</i> for <i>1-2 years</i> (as noted on application). <input type="checkbox"/> Participate as a partner in Co-Coaching (Intermediate to novice, Intermediate/Intermediate or Intermediate to Senior) <input type="checkbox"/> Complete Myers-Briggs Type Indicator, CliftonStrengths and Thomas-Kilmann Conflict Mode Instrument Results (email iehss.admin@unh.edu) <input type="checkbox"/> Complete LEAN <i>Yellow Belt</i> certification (contact iehss.admin@unh.edu to get code.) <input type="checkbox"/> Complete relationship building communication (TCRP , PEP) and relational coordination programs (Relational Dimensions of Improvement and Change Program). <input type="checkbox"/> Coach a team and leaders with minimal support: independent problem-solving, identification of resources, etc.	<input type="checkbox"/> Complete requirements for <i>Intermediate Coach</i> , including update of templates A-G. <input type="checkbox"/> Coach <i>12 microsystems</i> and <i>at least 12 mesosystems</i> for at least <i>4-5 years</i> independently in multiple health system contexts (as noted on application). <input type="checkbox"/> Participate as a partner in Co-Coaching (Senior to novice, Senior to intermediate, Senior/Senior) <input type="checkbox"/> Complete LEAN <i>Green Belt</i> certification (contact iehss.admin@unh.edu to get code.) <input type="checkbox"/> Become certified in other specialty domains specific to improvement and systems i.e.: other coaching models, communication, relationships, relational coordination, leadership, and NCQA. <input type="checkbox"/> Coach multiple levels of organizations including leadership at multiple levels of the organization. <input type="checkbox"/> Independently oversee team coaching programs.	<input type="checkbox"/> Complete requirements for <i>Senior Coach Level 1</i> , including update of templates A-G. <input type="checkbox"/> Coach <i>multiple microsystems</i> and <i>mesosystems</i> in multiple contexts and health systems nationally and internationally independently for <i>over 7 years</i> (as noted on application). <input type="checkbox"/> Participate as a partner in Co-Coaching (Senior to novice, Senior to intermediate, Senior/Senior) <input type="checkbox"/> Complete LEAN <i>Black Belt</i> (contact iehss.admin@unh.edu to get code.) <input type="checkbox"/> Collaborate with the Institute to develop supportive materials, processes and research. <input type="checkbox"/> Actively advise the Institute on team coaching insights and recommendations. <input type="checkbox"/> Mentor multiple team coaches, teach in formal development programs, contributes to material and resource development.

CIT	Novice 1	Novice 2	Intermediate	Senior Level 1	Senior Level 2
		<p>d) <u>Leader Evaluation</u> (IEHSS will send aggregate results to coach – see above for email script),</p> <p>e) <u>Team Coaching Evaluation by Coachees Results Summary</u></p> <p>f) <u>Team Coaching Evaluation by Leaders Results Summary</u></p> <p>g) Email iehss.admin@unh.edu for Reflected Best Self Materials for Peer Review)</p>	<p><input type="checkbox"/> Ensure current in revisions, updates, innovation, materials, resources, applied microsystem theory learning platforms and supportive technology (e.g., ImproveApp™ Structure and Process and RēsWell.)</p> <p><input type="checkbox"/> Regularly collaborate with organizational leadership (micro-meso-macro leaders) to link strategic improvement with team coaching activities.</p> <p><input type="checkbox"/> Contribute to teaching team coaching in a variety of settings (use h) <u>Teaching Worksheet.</u>)</p> <p><input type="checkbox"/> Develop team coaching network within context of team coaches and helps to facilitate team coaching network support.</p> <p><input type="checkbox"/> Evaluation of coach during site visit (if applicable). If you would like to submit this evaluation, please send your team a link to this survey (https://unh.az1.qualtrics.com/jfe/form/SV_5A0qPJP6ane3nE) and let us know below so that we can download your report and add it to your application. Only an aggregate report will be shared with you and individual submissions will remain anonymous.</p>	<p><input type="checkbox"/> Mentor 1-2 team coaches, teaches in formal development programs (use i) <u>Mentee Evaluation Worksheet.</u>)</p> <p><input type="checkbox"/> Become involved in team coaching networks and presents team coaching impact and results.</p> <p><input type="checkbox"/> Become active in web based social media, blogs, virtual and in person learning sessions.</p> <p><input type="checkbox"/> Participate in research about team coaching, leadership and improvement.</p> <p><input type="checkbox"/> Submit a portfolio of team coaching experience including case studies demonstrating the team coaching model, process and outcome measures, specific team coaching strategies and dashboards for subgroups who have been coached (use template i) <u>Outcomes and Measurement of Team Coaching.</u>)</p> <p><input type="checkbox"/> Schedule an interview, observation (team and leadership coaching and teaching.) Evaluation by a selected committee is part of the process.</p>	<p><input type="checkbox"/> Participate as member of team coaching/improvement advisory groups and team coaching networks.</p> <p><input type="checkbox"/> Independently facilitate and coordinate the team coaches in an improvement collaborative or organization.</p> <p><input type="checkbox"/> As a member of a research team or individually, design a research proposal about team coaching, leadership and improvement and execute proposals, analyze results and publish.</p> <p><input type="checkbox"/> Publish documents specific to team coaching, microsystem improvement, leadership development, outcomes and results and other topics related to population health, organizations, learning health systems in a variety of media.</p> <p><input type="checkbox"/> Schedule an interview, observation (team and leadership coaching and teaching.) Evaluation by a selected committee is part of the process.</p>

Adapted from Dreyfus Model adapted by Pat Benner.

Benner, P. (2004). [Using the Dreyfus Model of Skill Acquisition to Describe and Interpret Skill Acquisition and Clinical Judgment in Nursing Practice and Education](https://doi.org/10.1177/0270467604265061). *Bulletin of Science, Technology & Society*, 24(3), 188–199. <https://doi.org/10.1177/0270467604265061>