B. CHECKLIST: Quality Improvement Team Coach Levels (Revised April 25, 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
☐Current participant in the Team Coaching Program.	☐Complete Microsystem team coach program. ☐Coach *one* clinical or supporting microsystem for *5-12 months*. ☐Provide resume or CV.	☐Complete requirements for *Novice 1*. ☐Coach at least *one* clinical microsystem for *12-18 months* (as noted on application). ☐ Participate as a partner in Co-Coaching (Novice/Intermediate or Novice/Novice) ☐Complete the **a)** Assessment and Development Tool including the Quality Improvement Assessment (QIA) ☐Create an individual **b) Team Coach Development Action Plan** for continued development -includes documented evidence of growth *including peer review and feedback from the team/leaders coached* (using **c) Coaching Evaluation by Coachee** *(does not need to be uploaded),* **d) Leader Evaluation** *(does not need to be uploaded),*	☐Complete requirements for *Novice 2,* including update of templates A-G. ☐Coach *6 microsystems* or more and *1 mesosystem* for *1-2 years* (as noted on application). ☐Participate as a partner in Co-Coaching (Intermediate to novice, Intermediate/Intermediate or Intermediate to Senior) ☐Complete LEAN *Yellow* Belt certification (contact iehss.admin@unh.edu to get code.) ☐Complete relationship building communication (TCRP, PEP) and relational coordination programs (Relational Dimensions of Improvement and Change Program). ☐Coach a team and leaders with minimal support: independent problem-solving, identification of resources, etc.	☐Complete requirements for *Intermediate Coach,* including update of templates A-G. ☐Coach *12 microsystems* and *at least 12 mesosystems* for at least *4-5 years* independently in multiple health system contexts (as noted on application). ☐Participate as a partner in Co-Coaching (Senior to novice, Senior to intermediate, Senior/Senior) ☐Complete LEAN *Green* Belt certification (contact iehss.admin@unh.edu to get code.) ☐Become certified in other specialty domains specific to improvement and systems i.e.: other coaching models, communication, relationships, relational coordination, leadership, and NCQA. ☐Coach multiple levels of organizations including leadership at multiple levels of the organization. ☐Independently oversee team coaching programs.	☐Complete requirements for *Senior Coach Level 1,* including update of templates A-G. ☐Coach *multiple microsystems and mesosystems* in multiple contexts and health systems nationally and internationally independently for *over 7 years* (as noted on application). ☐ Participate as a partner in Co-Coaching (Senior to novice, Senior to intermediate, Senior/Senior) ☐Complete LEAN *Black* Belt (contact iehss.admin@unh.edu to get code.) ☐Collaborate with the Institute to develop supportive materials, processes and research. ☐Actively advise the Institute on team coaching insights and recommendations. ☐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
		e) Team Coaching Evaluation by Coachees Results Summary **f) Team Coaching Evaluation by Leaders Results Summary** **g) Email iehss.admin@unh.edu for Reflected Best Self Materials for Peer Review)**	☐Ensure current in revisions, updates, innovation, materials, resources, applied microsystem theory learning platforms and supportive technology (e.g., ImproveApp™ Structure and Process and RēsWell.) ☐Regularly collaborate with organizational leadership (micro-meso-macro leaders) to link strategic improvement with team coaching activities. ☐Contribute to teaching team coaching in a variety of settings (use **h) Teaching Worksheet.**) ☐Develop team coaching network within context of team coaches and helps to facilitate team coaching network support. ☐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_5AoqPJPU6ane3nE) 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.	☐Mentor 1-2 team coaches, teaches in formal development programs (use **i) Mentee Evaluation Worksheet**.) ☐Become involved in team coaching networks and presents team coaching impact and results. ☐Become active in web based social media, blogs, virtual and in person learning sessions. ☐Participate in research about team coaching, leadership and improvement. ☐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) Outcomes and Measurement of Team Coaching**). ☐Schedule an interview, observation (team and leadership coaching and teaching.) Evaluation by a selected committee is part of the process.	☐Participate as member of team coaching/improvement advisory groups and team coaching networks. ☐Independently facilitate and coordinate the team coaches in an improvement collaborative or organization. ☐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. ☐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. ☐Schedule an interview, observation (team and leadership coaching and teaching.) Evaluation by a selected committee is part of the process.

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. *Bulletin of Science, Technology & Society*, 24(3), 188–199. https://doi.org/10.1177/0270467604265061