

**WISCONSIN COACHING CHECKLIST**

Name of the Organization: \_\_\_\_\_

Date Began Project: \_\_\_\_\_

**Beginning and Learning: (0-6 months)**

Learn the NIATx way: \_\_\_\_\_

Know the key principles to understand the customer: \_\_\_\_\_

See how other organizations have improved: \_\_\_\_\_

Share findings and compare to baseline data: \_\_\_\_\_

Learn about Project Charters and Project Change Form: \_\_\_\_\_

Initial Exposure to Website: \_\_\_\_\_

Implement and keep momentum going with PDSA cycles: \_\_\_\_\_

Share experiences with other STAR-SI Providers through monthly provider phone calls and learning session opportunities: \_\_\_\_\_

Use and Master the Nominal Group Technique: \_\_\_\_\_

Flowcharting as needed: \_\_\_\_\_

**Using and Mastering: (7-12 Months)**

Move toward NIATx as a way of business: \_\_\_\_\_

Produce Business case materials: \_\_\_\_\_

Master PDSA Cycle: \_\_\_\_\_

Learn methods to integrate new practices and learning kits: \_\_\_\_\_

Improve understanding of sustainability (send sustainability tool): \_\_\_\_\_

Develop sustainability plan: \_\_\_\_\_

Create succession plans and staff buy-in methods: \_\_\_\_\_

Learn the art of story telling and celebrate successes by sharing your story (elevator speech, storyboard instructions PP): \_\_\_\_\_

**Strengthening and Sustaining: (13-18 Months):**

Integrate NIATx into major organizational processes: \_\_\_\_\_

Join PDSAs with QA, PI, Outcome Measures and the Business Case: \_\_\_\_\_

Understand the Performance Management Model: \_\_\_\_\_

Integrate PDSAs into daily work and a way of doing business: \_\_\_\_\_

Continue to capitalize on the NIATx web-site: \_\_\_\_\_

Understand how to sustain and address common problems associated with sustaining the gains: \_\_\_\_\_

Make plans for sustainability and spread: \_\_\_\_\_

Link strategic goals to NIATx where possible: \_\_\_\_\_

Understand the need for refreshment, motivation, renewal and excitement in NIATx work: \_\_\_\_\_

Introductory Call with Executive Sponsor and Change Leader: \_\_\_\_\_

Site Visit: \_\_\_\_\_

Is PI 101 PowerPoint or the NIATx Way document appropriate to share?: \_\_\_\_\_

Referred to Change Leader Academy: \_\_\_\_\_

Connected with Monthly Group Teleconference Call: \_\_\_\_\_

Scheduled 1:1 Monthly Teleconference Call with Coach, State or Peer Mentor: \_\_\_\_\_

**Progress Tracking Tools:**

Sent Walk-through Forms: \_\_\_\_\_

Received Walk-through Form: \_\_\_\_\_

Sent Change Project Form: \_\_\_\_\_

Received Change Project Form (1<sup>st</sup> and subsequent times CPFs, review Project Charter; PDSA cycles on-going): \_\_\_\_\_

Sent Data Excel Spreadsheet: \_\_\_\_\_

Receiving Data on a Monthly Basis: \_\_\_\_\_

Sent e-mail of congratulations on getting Foundational pieces in: \_\_\_\_\_

**Resource Materials**

NIATx Smart Chart: \_\_\_\_\_

NIATx Workbook: \_\_\_\_\_

NIATx List of Promising Practices: \_\_\_\_\_

NIATx Change Bulletin: \_\_\_\_\_

NIATx Registration via NIATx.net (also includes NIATx e-news) and Tour of Website: \_\_\_\_\_

NIATx Business Case Series: \_\_\_\_\_

DHS Flashcards: \_\_\_\_\_

Variances Letter: \_\_\_\_\_