



ACTIVITY: Checklist for Starting a UBT

Purpose

This checklist is a guide for you to chart your UBT startup progress. It highlights the important components that must be identified and in place for a UBT to be successful.

After completion of all items on the checklist, the UBT will be ready to work as a team to improve performance. Review this checklist before you begin working with your team. Check off items as you begin working together to ensure the team is ready to begin.

Team Type: (select the applicable choice)

Project Team (select one below)

- ☐ work unit ☐ department
- ☐ facility ☐ medical center

Governance Team (select one below)

- ☐ work unit ☐ department
- ☐ facility ☐ medical center

Team Sponsorship:

- ☐ Sponsorship obtained from management and labor at appropriate levels
- ☐ Team readiness assessed, including adequate functional relationships
- ☐ Goals and scope of work clarified
- ☐ Adequate resources available

Team Membership:

- ☐ Size of team determined
- ☐ Co-leads selected
- ☐ Composition of team determined

Team Charter:

- ☐ Team purpose
- ☐ Roles: recorder, timekeeper, facilitator
- ☐ Scope of work
- ☐ Decision-making process(s) agreed to
- ☐ Goals, targets, metrics
- ☐ Quorum established for:
 - ☐ Working agreements—holding a meeting—decision making
 - ☐ Communication plan established to: all staff—stakeholders—sponsors

Team Member UBT Training:

- ☐ Training needs assessed
- ☐ Appropriate training completed

Facilitation: (select one below)

- ☐ Internal—by team members, for meeting management in regular situations
- ☐ External—neutral facilitator, for difficult issues (e.g., formal issue resolution) and/or when relationships are strained