

PATH TO PERFORMANCE

DIMENSION	LEVEL 1: Pre-Team Climate	LEVEL 2: Foundational UBT	LEVEL 3: Transitional UBT	LEVEL 4: Operational UBT	LEVEL 5: High-Performing UBT
SPONSORSHIP	<ul style="list-style-type: none"> + Sponsors are identified and introduced to team. 	<ul style="list-style-type: none"> + Sponsors trained. + Charter completed. + Sponsor agreement completed. 	<ul style="list-style-type: none"> + Sponsors regularly communicating with co-leads (minimum monthly communication). 	<ul style="list-style-type: none"> + Sponsors visibly support teams (minimum monthly contact plus quarterly in-person visit). + Minimal outside support needed. 	<ul style="list-style-type: none"> + Sponsors holding teams accountable for performance and reporting results to senior leadership.
LEADERSHIP	<ul style="list-style-type: none"> + Team co-leads are identified or process of identification is under way. + Team has identified health and safety champion(s). 	<ul style="list-style-type: none"> + Co-leads have developed a solid working relationship and are jointly planning the development of the team. 	<ul style="list-style-type: none"> + Co-leads are seen by team members as jointly leading the team. 	<ul style="list-style-type: none"> + Co-leads are held jointly accountable for performance by sponsors and executive leadership. + Trust has been built to such an extent that either co-lead can lead meetings in the other's absence. + Health and safety champion(s) have begun work with team. 	<ul style="list-style-type: none"> + Team beginning to operate as a "self-managed team," with most day-to-day decisions made by team members. + Self-managed teams have developed a level of trust that allows them to proceed with work/meetings in the absence of both co-leads.* <i>*This is not intended to supersede the UBT charter.</i>
TRAINING	<ul style="list-style-type: none"> + Co-lead training completed. + Team has created initial action plan and keeps it updated. 	<ul style="list-style-type: none"> + Team member training (e.g., UBT Orientation, RIM+) completed. 	<ul style="list-style-type: none"> + Advanced training (e.g., business literacy, coaching skills, metrics) completed. + UBT Tracker training completed. + Representative team members have completed business literacy training subject to regional/medical center availability. 	<ul style="list-style-type: none"> + Advanced training (e.g., training in process improvement tools, change management training; depends on team needs). + Focus area-specific training (e.g., patient safety or improvement tools to address human error-related issues). + In consultation with their sponsors, teams should determine which types of training are appropriate using the examples listed above. 	<ul style="list-style-type: none"> + Focus area-specific training. + Advanced performance improvement training (e.g., deeper data analysis, control charts, improvement methods). + In consultation with their sponsors, teams should determine which types of training are appropriate using the examples listed above.
TEAM PROCESS	<ul style="list-style-type: none"> + Traditional; not much change evident. + Team meetings scheduled and/or first meeting completed. 	<ul style="list-style-type: none"> + Staff meetings operating as UBT meetings (no parallel structure). + Co-leads jointly planning and leading meetings. 	<ul style="list-style-type: none"> + Team meetings are outcome-based; team members are participating actively in meetings and contributing to team progress and decision making. + Co-leads moving from direction to facilitation. 	<ul style="list-style-type: none"> + Co-leads jointly facilitate team meetings using outcome-focused agendas, effective meeting skills and strategies to engage all team members in discussion and decision making. + Team makes use of huddles to reflect on tests and changes made. + Team collects own data and reviews to see whether changes are helping improve performance. 	<ul style="list-style-type: none"> + Team beginning to move from joint management to self-management, with most day-to-day decisions made by team members. + Unit culture allows team to respond to changes quickly. + Team can move from first local project to next improvement project and can apply more robust changes. + Team measures progress using annotated run charts. + In consultation with their sponsors, member-facing departments are getting direct input from the voice of the customer + Team must spread or adopt a successful practice.
TEAM MEMBER ENGAGEMENT	<ul style="list-style-type: none"> + Minimal. 	<ul style="list-style-type: none"> + Team members understand and use partnership processes. i.e., consensus decision making. + Team has established a communication structure to reach all members of the department. 	<ul style="list-style-type: none"> + Team members understand key performance metrics. + At least half of team members can articulate what the team is improving and what their contribution is. 	<ul style="list-style-type: none"> + Unit performance data is discussed regularly. + Large majority of team members are able to articulate what the team is improving and their contribution. 	<ul style="list-style-type: none"> + Team members able to connect unit performance to broader strategic goals of company. + Full transparency of information. + Team is working on tests of change related to staffing, scheduling, financial improvement, and other daily operations issues.
USE OF TOOLS	<ul style="list-style-type: none"> + Not in use. 	<ul style="list-style-type: none"> + Team members receive training in RIM+, etc. 	<ul style="list-style-type: none"> + Team is able to use RIM+ and has completed two testing cycles within one or more projects. + Team has begun documenting projects and testing cycles in UBT Tracker. 	<ul style="list-style-type: none"> + Team has completed three or more testing cycles, making more robust changes (e.g., workflow improvement rather than training). + Team documents all projects and testing cycles in UBT Tracker at least every 90 days. 	<ul style="list-style-type: none"> + Team using advanced performance improvement training. + Team can move from initial project to next improvement effort, applying deeper data and improvement methods.
GOALS AND PERFORMANCE	<ul style="list-style-type: none"> + Team does not have goals yet. 	<ul style="list-style-type: none"> + Co-leads discuss and present data and unit goals to teams. 	<ul style="list-style-type: none"> + Team has set performance targets, and targets are aligned with unit, department and regional priorities. 	<ul style="list-style-type: none"> + Team has achieved at least one target on a key performance metric. + UBT can demonstrate improvements on at least two areas of the Value Compass (to be implemented when UBT Tracker allows projects to be listed under more than one category). 	<ul style="list-style-type: none"> + Team is achieving targets and sustaining performance on multiple measures. + UBT can demonstrate improvements in all areas of the Value Compass (to be implemented when UBT Tracker allows projects to be listed under more than one category). + Team demonstrates a culture of health and safety.