# PATH TO PERFORMANCE

<table>
<thead>
<tr>
<th>DIMENSION</th>
<th>LEVEL 1: Pre-Team Climate</th>
<th>LEVEL 2: Foundational UBT</th>
<th>LEVEL 3: Transitional UBT</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPONSORSHIP</td>
<td>+ Sponsors are identified and introduced to team.</td>
<td>+ Sponsors trained. + Charter completed. + Sponsor agreement completed.</td>
<td>+ Sponsors regularly communicating with co-leads (minimum monthly communication).</td>
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<td>LEADERSHIP</td>
<td>+ Team co-leads are identified or process of identification is under way. + Team has identified health and safety champion(s).</td>
<td>+ Co-leads have developed a solid working relationship and are jointly planning the development of the team.</td>
<td>+ Co-leads are seen by team members as jointly leading the team.</td>
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<td>TRAINING</td>
<td>+ Co-lead training completed. + Team has created initial action plan and keeps it updated.</td>
<td>+ Team member training (e.g., UBT Orientation, RIM+) completed.</td>
<td>+ 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.</td>
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<td>TEAM PROCESS</td>
<td>+ Traditional; not much change evident. + Team meetings scheduled and/or first meeting completed.</td>
<td>+ Staff meetings operating as UBT meetings (no parallel structure). + Co-leads jointly planning and leading meetings.</td>
<td>+ 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.</td>
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<td>TEAM MEMBER ENGAGEMENT</td>
<td>+ Minimal.</td>
<td>+ 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.</td>
<td>+ Team members understand key performance metrics. + At least half of team members can articulate what the team is improving and what their contribution is.</td>
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<td>USE OF TOOLS</td>
<td>+ Not in use.</td>
<td>+ Team members receive training in RIM+, etc.</td>
<td>+ 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.</td>
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<td>GOALS AND PERFORMANCE</td>
<td>+ Team does not have goals yet.</td>
<td>+ Co-leads discuss and present data and unit goals to teams.</td>
<td>+ Team has set performance targets, and targets are aligned with unit, department and regional priorities.</td>
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<td>DIMENSION</td>
<td>LEVEL 4: Operational UBT</td>
<td>LEVEL 5: High-Performing UBT</td>
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| **SPONSORSHIP** | + Sponsors visibly support teams (minimum monthly contact plus quarterly in-person visit).  
+ Minimal outside support needed. | + Sponsors holding teams accountable for performance and reporting results to senior leadership. |
| **LEADERSHIP** | + 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. | + 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.* |
| **TRAINING** | + 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. | + 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** | + 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. | + 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** | + Unit performance data is discussed regularly.  
+ Large majority of team members are able to articulate what the team is improving and their contribution. | + 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** | + 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. | + 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** | + 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). | + 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. |

*This is not intended to supersede the UBT charter.*