|  | CHECKLISTStarting a UBT |
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|  | PURPOSEThis 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.When to UseUse this checklist when starting a new UBT to help form the new team. Review this checklist before you begin working with your team.Who UsesCo-leads.How to UseComplete all the items on the checklist so that the UBT will be ready to work as a team to improve performance. Check off the items to improve performance. Check off the items to ensure the team is ready to begin. |
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| Project Team (select one) | Governance Team (select one) |
|  | work unit |  | work unit |
|  | facility |  | facility |
|  | department |  | department |
|  | medical center |  | medical center |

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| 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. |

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| Team Membership |
|  | Size of team determined. |
|  | Co-leads selected. |
|  | Team composition determined. |

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| Team Charter |
|  | Team purpose. |
|  | Roles: recorder, timekeeper, facilitator. |
|  | Scope of work. |
|  | Decision-making process(es) agreed to. |
|  | Quorum established for working agreements such as holding a meeting and decision making. |
|  | Communication plan established to: all staff, stakeholders and sponsors. |

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| Team Member UBT Training |
|  | Training needs assessed. |
|  | Appropriate training completed. |

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| Facilitation (select one) |
|  | 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. |

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