|  | CHECKLIST 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.  When to Use  Use this checklist when starting a new UBT to help form the new team. Review this checklist before you begin working with your team.  Who Uses  Co-leads.  How to Use  Complete 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. |
|  | |  |  |  |  | | --- | --- | --- | --- | | Project Team (select one) | | Governance Team (select one) | | |  | work unit |  | work unit | |  | facility |  | facility | |  | department |  | department | |  | medical center |  | 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. | |  | Team composition determined. |  |  |  | | --- | --- | | 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. |  |  |  | | --- | --- | | Team Member UBT Training | | |  | Training needs assessed. | |  | Appropriate training completed. |  |  |  | | --- | --- | | 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. | |