



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.



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Project Team (select one)		Governance Team (select one)	
<input type="checkbox"/>	work unit	<input type="checkbox"/>	work unit
<input type="checkbox"/>	facility	<input type="checkbox"/>	facility
<input type="checkbox"/>	department	<input type="checkbox"/>	department
<input type="checkbox"/>	medical center	<input type="checkbox"/>	medical center

Team Sponsorship

<input type="checkbox"/>	Sponsorship obtained from management and labor at appropriate levels.
<input type="checkbox"/>	Team readiness assessed, including adequate functional relationships.
<input type="checkbox"/>	Goals and scope of work clarified.
<input type="checkbox"/>	Adequate resources available.

Team Membership

<input type="checkbox"/>	Size of team determined.
<input type="checkbox"/>	Co-leads selected.
<input type="checkbox"/>	Team composition determined.

Team Charter

<input type="checkbox"/>	Team purpose.
<input type="checkbox"/>	Roles: recorder, timekeeper, facilitator.
<input type="checkbox"/>	Scope of work.
<input type="checkbox"/>	Decision-making process(es) agreed to.
<input type="checkbox"/>	Quorum established for working agreements such as holding a meeting and decision making.
<input type="checkbox"/>	Communication plan established to: all staff, stakeholders and sponsors.

Team Member UBT Training

<input type="checkbox"/>	Training needs assessed.
<input type="checkbox"/>	Appropriate training completed.

Facilitation (select one)

<input type="checkbox"/>	Internal—by team members, for meeting management in regular situations.
<input type="checkbox"/>	External—neutral facilitator, for difficult issues (e.g., formal issue resolution) and/or when relationships are strained.