



PATH TO PERFORMANCE

DIMENSION	LEVEL 1: Pre-Team Climate	LEVEL 2: Foundational UBT	LEVEL 3: Transitional UBT
SPONSORSHIP	+ Sponsors are identified and introduced to team.	+ Sponsors trained. + Charter completed. + Sponsor agreement completed.	+ Sponsors regularly communicating with co-leads (minimum monthly communication).
LEADERSHIP	+ Team co-leads are identified or process of identification is under way. + Team has identified health and safety champion(s).	+ Co-leads have developed a solid working relationship and are jointly planning the development of the team.	+ Co-leads are seen by team members as jointly leading the team.
TRAINING	+ Co-lead training completed. + Team has created initial action plan and keeps it updated.	+ Team member training (e.g., UBT Orientation, RIM+) completed.	+ 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.
TEAM PROCESS	+ Traditional; not much change evident. + Team meetings scheduled and/or first meeting completed.	+ Staff meetings operating as UBT meetings (no parallel structure). + Co-leads jointly planning and leading meetings.	+ 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.
TEAM MEMBER ENGAGEMENT	+ Minimal.	+ 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.	+ Team members understand key performance metrics. + At least half of team members can articulate what the team is improving and what their contribution is.
USE OF TOOLS	+ Not in use.	+ Team members receive training in RIM+, etc.	+ 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.
GOALS AND PERFORMANCE	+ Team does not have goals yet.	+ Co-leads discuss and present data and unit goals to teams.	+ Team has set performance targets, and targets are aligned with unit, department and regional priorities.

DIMENSION	LEVEL 4: Operational UBT	LEVEL 5: High-Performing UBT
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.* <i>*This is not intended to supersede the UBT charter.</i>
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.