PARTICIPANT GUIDE

UNIT-BASED TEAM CO-LEAD
WORKSHOP

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NOTES

Welcome and Introduction

Welcome to the Co-Lead Workshop. This workshop is designed to provide you with information on the roles and responsibilities of leading a UBT. You also will have the opportunity to identify how to manage different working styles.

Before we begin today's workshop, we would like you to take a moment to assess your current co-lead skill levels and experience. Take a moment to complete the "NOW" section of the CO-LEAD SKILLS AND EXPERIENCE WORKSHEET on the next page.

"You gain strength, courage and confidence by every experience in which you really stop to look fear in the face. You must do the thing you think you cannot do."

Eleanor Roosevelt

CO-LEAD SKILLS AND EXPERIENCE

Working with Co-Lead to…	"NOW" Score		"GAIN" Score		"GAIN" Score (90 days)	
	LOW HIGH		LOW HIGH		LOW HIGH	
Organize LMP Work Team: • Facilitate creation of charter with team • Help to develop trust • Help team to understand the differences between LMP work teams and traditional teams	1 2 3 4 5		1 2 3 4 5		1 2 3 4 5	
Plan meetings in advance: • Decide on meeting purpose, outcomes, discussion leaders for each item, processes to be used • Discuss room acquisition, supplies needed and set-up logistics	1 2 3 4 5		1 2 3 4 5		1 2 3 4 5	
Open meeting: • Facilitate introductions • Identify and clarify roles as needed • Review agenda and solicit additions/changes	1 2 3 4 5		1 2 3 4 5		1 2 3 4 5	
Manage meeting discussion: • Encourage and balance participation • Build team memory by flipcharting key information • Manage agenda transitions and keep group on track • Create a safe environment to share ideas	1 2 3 4 5		1 2 3 4 5		1 2 3 4 5	

(continued)

CO-LEAD SKILLS AND EXPERIENCE

Working with Co-Lead to…	"NOW" Score		"GAIN" Score		"GAIN" Score (90 days)	
	LOW HIGH		LOW HIGH		LOW HIGH	
Close meeting: • Confirm agreements and action items with team • Review Parking Lot items • Create draft agenda for next meeting with team • Create interactive communication plan for constituents and sponsors • Conduct a written evaluation of meeting	1 2 3 4 5		1 2 3 4 5		1 2 3 4 5	
Model partnership behaviors: • Communicate with co-lead early and often as issues arise • Manage conflicts constructively • Be open to all ideas and interests • Listen attentively	1 2 3 4 5		1 2 3 4 5		1 2 3 4 5	
Utilize UBT tools and processes: • Facilitate consensus decision making and interest-based problem solving	1 2 3 4 5		1 2 3 4 5		1 2 3 4 5	

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Co-Lead Action Planning Worksheet (Working Style)

UBT Name: _____

Management Co-Lead: _____

Labor Co-Lead: _____

Use this worksheet to capture working agreements between co-leads in the following areas:

Co-Lead Working Style:

My working style is _____

My partner's (Co-Lead) style is _____

Ways my partner and I can effectively communicate with one another. . .

_____

_____

_____

_____

Ways my partner and I can successfully resolve conflict together. . .

_____

_____

_____

Reward and recognition strategies that are meaningful for us. . .

_____

_____

_____

_____

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Co-Lead Action Planning Worksheet (working style)

Co-Lead Working Style

I would appreciate if you. . . (fill in partner's response)

_____

_____

_____

I would appreciate if you do not. . . (fill in partner's response)

_____

_____

_____

I'd like to ask for your support in. . . (fill in partner's response)

_____

_____

_____

I hope to achieve _____ with you. . . (fill in partner's response)

_____

_____

_____

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Co-Lead Action Planning Worksheet (Practices for Success)

What are some practices for success we will agree to do right now?

_____

_____

_____

Co-Lead Working Style

Given our different styles, what agreements do we need to make regarding how we will work together with the following scenarios:

Planning meeting agendas and future goals?

_____

_____

Running meetings?

_____

_____

Closing meetings?

_____

_____

Requesting help from our Sponsors or Senior Leaders?

_____

_____

_____

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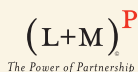
Co-Lead Action Planning Worksheet

When communicating the Case for Change

- Keep it brief, but to the point
- Make it personal
- Use stories to communicate the rational, emotional, and social reasons for this work
- Be sincere and honest
- Use visual aids
- Share it with all new team members
- Reinforce often

Casting your Vision for the Case for Change

Scenario: Your conducting your first UBT meeting as co-leads. What will you say when sharing your vision with the team

1. Write what you will say.

2. Practice casting your vision to the group.

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Co-Lead Action Planning Worksheet (Planning)

Planning for Meetings

Review and revise the sample meeting agenda for your first UBT meeting

Unit-Based Team Name:	
Date and Time:	Location:
Notetaker:	Meeting Facilitator:
Present:	Absent:
(Check for quorum)	

TOPIC	TIME	PURPOSE AND DESIRED OUTCOMES	WHO/ HOW	NOTES/ ACTION
Meeting Opening • Welcome and Introductions • Provide overview of meeting agenda • Share vision of UBT	10 min	Awareness of desired outcome for meeting and about the vision of the UBT	Both Co-Leads	
UBT Charter • Review draft charter agreements • Discuss and revise • Approve charter	20 min	Consensus reached on approving UBT Charter	Co-Lead Name	
UBT Meetings • Determine frequency of meeting • Establish and on-going meeting schedule • Determine meeting roles (ex. note taker for minutes, timekeeper, consensus tracker)	10 min	Meeting frequency and schedules set Roles of participants in meeting determined	Co-Lead Name	
UBT Communication Plan • Review communication plan • Discuss and revise • Approve communication plan • Discuss next steps and communicaiton action items after this meeting	20 min	Consensus reached on approving UBT Communicaiton Plan Determine action items and next steps to implement communication plan after this UBT meeting	Co-Lead Name	

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Co-Lead Action Planning Worksheet (Planning)

Planning for Meetings (continued)

TOPIC	TIME	PURPOSE AND DESIRED OUTCOMES	WHO/ HOW	NOTES/ ACTION
UBT Project Selected • Review PDSA model generated during the RIM training • Discuss next steps and action items	20 min	Consensus reached on selection of UBT Project Written agreements about next steps and action items	Co-Lead Name	
Meeting Close • Review/document consensus reached during meeting • Summarize next steps and action items • List future agenda items for next meeting • Conduct meeting evaluation (plus/ delta) • State next meeting date	10 min	Confirmation of decisions reached Confirmation of action items and next steps after meeting Suggestions for areas of focus and improvements for the next meeting Confirmation of next meeting date	Co-Lead Name	

Meeting notes distributed to team members on:

_____

_____

_____

_____

_____

_____

_____

_____

_____

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Co-Lead Action Planning Worksheet (Planning)

Details of our first UBT Meeting

Date of first meeting: _____

Time (start and end): _____

Location: _____

Room set-up arrangement: _____

Equip./Material required: _____

Responsibilities for Meeting Preparation

Task	Person Responsible	Date Due
Creating final agenda document		
Scheduling/inviting UBT Team		
Distribute agenda or other documents prior to meeting (provides participants with time to review)		
Bring equip./material to the room (ex. AV equipment, printed agenda, UBT Charter, etc.)		
Setting up Room		
Other		

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Co-Lead Action Planning Worksheet (Opening)

Opening Meetings

Opening our UBT Meetings		

Task	Agreements	Person(s) Responsible During Meeting
• How do we want to start the meeting? • Do we need introductions, team activity or an icebreaker? • Are "housekeeping" announcements necessary? (ex. location of restrooms, etc.) • Are we going to establish ground rules? (ex. pagers and cell phones on silent)		
• How should we review the meeting agenda? • Do we nee to ask for agreement on the agenda before starting?		

• Should we introduce the 5 chart pages:
  • Agreements
  • Action Items
  • Communications
  • Future Agendas
  • Parking Lot?		

• How should we cast our UBT Vision?		
Other		

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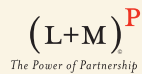
Co-Lead Action Planning Worksheet (Running)

Running Meetings

How we will respond to the following common meeting challenges:

Someone is dominating the conversation during the UBT meeting

_____

_____

_____

_____

We are not sticking to the agenda

_____

_____

_____

_____

Individuals are having side conversations or repeatedly leaving the room to answer their phones

_____

_____

_____

_____

Other situation(s)

_____

_____

_____

_____

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Co-Lead Action Planning Worksheet (Closing)

Closing Meetings

Closing our UBT Meetings

Task	Agreements	Person(s) Responsible During Meeting
• How will we clarify and confirm agreements and consensus reached during the meeting?		
• How will we review action items and agree on next steps? (Including ensuring the communication plan is followed after the meeting)		
• Will we draft the next meeting agenda?		
• How will we respond to parking lot items?		
• How will we conduct the plus/delta to evaluate the meeting?		
Other		

"An idea, to be suggestive, must come to the individual with the force of a revelation."

William James, philosopher, 1911

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Co-Lead Action Planning Worksheet (Communication)

Communication Templates

Complete the following template to communicate your UBT Vision

ACTIVITY: Communication/Stakehold Summary for UBT

SAMPLE NO. 2

Date of meeting:	Date to be completed and given to co-leads:

Tell messages Example: *Vision of our UBT*	Ask about
Key messages to tell staff about	Key questions to ask staff
1. 2. 3. 4. 5.	1. 2. 3. 4. 5.

Name of staff	Who will brief	Initials after brief	Comments	Date
1.				
2.				
3.				
4.				

Source: Roxanne WhiteLight, Consultant KPNW

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Co-Lead Action Planning Worksheet (Communication)

Communication Templates

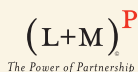Complete the following template to ask for Unit input regarding potential UBT projects

ACTIVITY: Communication/Stakehold Summary for UBT

SAMPLE NO. 2

Date of meeting:	Date to be completed and given to co-leads:

Tell messages	Ask about Example: *Potential UBT Projects*
Key messages to tell staff about	Key questions to ask staff
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Name of staff	Who will brief	Initials after brief	Comments	Date
1.				
2.				
3.				
4.				

Source: Roxanne WhiteLight, Consultant KPNW

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Co-Lead Action Planning Worksheet (Communication)

Communication Templates

Sample of communication plan

ACTIVITY: Communication Plan for Stakeholders

SAMPLE NO. 1

Communication Plan:			Date:	

What are we communicating?	Who do we need to communicate this to?	What method will we use to communicate and how will we obtain feedback?	By when and how often will we communicate this message?	Who is responsible for communicating this message?
(Be specific)	(List internal and external audiences)	(List UBT huddles, newsletters, email, or other methods)	(Indicate the frequency and due dates)	(List specific names)
UBT minutes with action items	All Unit Staff	Posting minutes on bulletin board Sending e-mail announcing meeting minute posting	No later than three days after the meeting	UBT notetaker to draft minutes and send to Co-Leads no later than two days after the meeting Co-Leads to review, post on bulletin board and send e-mail three days after the meeting
Upcoming UBT meeting dates and agendas	UBT Team	Incorporate UBT Team Meeting into shift schedule Send e-mail reminder to team two weeks prior to meeting	Schedule four weeks in advance Send e-mail reminder to team two weeks prior to meeting	Cindy (Co-Lead) to schedule into shift Landon (Co-Lead) to send e-mail reminder
Other				

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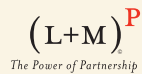
Co-Lead Action Planning Worksheet (Communication)

Communication Templates

Create your UBT's communication plan

ACTIVITY: Communication Plan for Stakeholders

SAMPLE NO. 1

Communication Plan:			Date:	
What are we communicating?	Who do we need to communicate this to?	What method will we use to communicate and how will we obtain feedback?	By when and how often will we communicate this message?	Who is responsible for communicating this message?
(Be specific)	(List internal and external audiences)	(List UBT huddles, newsletters, email, or other methods)	(Indicate the frequency and due dates)	(List specific names)

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Co-Lead Action Planning Worksheet (Meeting Minutes)

Sample Meeting Minutes

ACTIVITY: Meeting Notes

Timekeeper: Amy Aloha	**Insert your team name here:**
Recorder: Mark Mahalo	
Facilitators: Karl Kamaaina	**Insert date of meeting here:** 3/1/10

MEETING NOTES

Topic	Discussion and Agreements	Action Item	Responsible Person and Deadline
Staff Education	Discuss the importance of providing consistent staff education so that everyone is consistent in the procedures and explanations. Reached agreement that it is best to have just one teacher provide education to staff (instead of several). The outcome of this standardization would be to minimize second stage variation.	Within the next week, review technique with staff, and collect data one week after review. Encourage staff to standardize pain assessment.	Tanya Aloha: Review techniques with staff by 3/7/10.

All team members: Collect data by 3/14/10 |
| Test of change #2 data | Discuss the amount of data that is required to be collected. Determined that team had varying opinions on the specific number of data points that needed to be collected and the timing of data collection. | Contact an outside expert for feedback on data collection requirement. | Karl Kamaaina: E-mail national contact to ask for suggestions of potential outside expert by 3/5/10.

Karl will contact expert and share feedback at next UBT meeting on 4/3/10. |

ADDITIONAL ACTION PLANNING NOTES

You can find more information on Action Planning in the UBT Start-Up Tool Kit, Tab 2: Action Planning and Vision or at www.lmpartnership.org/ubt/starting-and-running-a-ubt/team-vision

Learning Objectives

After successful completion of today's workshop, you will:

- Define a UBT and describe its purpose

- Summarize the roles and responsibilities of unit-based teams

- Differentiate between different work styles and summarize how they contribute to a team's development and success

- Identify practices in your role as co-leads that will improve team processes and results

- Review performance improvement tools

- Learn and practice a coaching methodology

Agenda

UBTS—WHAT ARE THEY?

UBTS—ROLES AND RESPONSIBILITIES

IDENTIFYING WORKING STYLES/SELF-ASSESSMENT

PERFORMANCE IMPROVEMENT TOOLS

COACHING FOR UBT SUCCESS

"If you believe you can, you probably can. If you believe you won't, you most assuredly won't. Belief is the ignition switch that gets you off the launching pad."

Denis Waitley

UBT Definition

UNIT-BASED TEAMS (UBTs) can be defined as a group of frontline employees, managers and physicians/dentists in a natural work setting who will, through consensus, be accountable for the performance of the unit and will determine the methods and metrics of the outcomes. The team's purpose should be aligned with the region's business strategy and desired outcomes related to improved performance, service quality, efficiency and growth and drive toward these outcomes with some level of consistency and standardization.

UBT Vision

UNIT-BASED TEAMS (UBTs) make Kaiser Permanente a better organization by providing high-quality care and services, relentlessly focusing on improving performance and by role modeling transformation in all interactions every day in service of each other, our patients and KP.

You can find more information on Vision in the UBT Start-Up Tool Kit, Tab 2: Action Planning and Vision or at www.lmpartnership.org/ubt/starting-and-running-a-ubt/team-vision

SUCCESS STORIES:

Teeming with good ideas

The Denver Regional Pharmacy unit-based team's modification of the way pharmacists attach their electronic signature to prescriptions has saved technicians hours of research, freeing them up to spend more time with patients. In the two pharmacies where the team instituted new batching practices, there was a 75 percent drop in the number of prescriptions requiring research.

Since that success, the regional team has taken on a sponsoring role for the smaller, pharmacy-specific UBTs.

"I like the (UBT) focus on efficiencies and waste because it ends up translating to a better work environment for employees," management co-lead Luanne Petricich says. "Especially with this project, we found the technicians were doing redundant work that did not provide job satisfaction. So taking that away allowed for more time with patients, which is what many would rather be doing."

TEAMS: WHAT'S THE DIFFERENCE?

UNIT-BASED TEAMS	TRADITIONAL WORKPLACE TEAMS
» Focus is on achieving long-term solutions	» Focus may be short term
» Union is provided business education	» Business education may not be provided
» Caucusing is routine and a norm	» Caucusing is not customary
» Membership may include institutional non-KP union staff	» Non-employees not allowed to participate
» No pre-determined solution(s)	» Issues often discussed with pre-determined solution(s)
» Consensus requires active support for decision	» Support for decisions may be optional
» Problems solved using interests and criteria	» Problems often solved using power and rights
» Labor and management each unilaterally select their own members	» Members selected by management
» All members held accountable for confidentiality	» "Confidential" information not usually shared
» Training in Partnership and consensus decision making and interest-based problem solving is required	» Team training at the option of management
» Strive for consensus decision making (no voting)	» Input, but generally no shared decision making by consensus
» Open information sharing	» Selective or little information sharing
» Jointly determined process	» Management determines process
» Labor involved in pre-planning	» Labor often not involved in the planning phase
» Team members have equal voice, regardless of position in the organization	» Team members have unequal voice, based on their titles and power

In Scope or Out of Scope?

IN SCOPE

- Issues and work processes at department or unit level

- Local policies, systems, assignment, schedules, etc.

- Decisions related to attaining UBT goals

- Working within such parameters as contract, budget, regulations, law, regulatory requirements, etc.

OUT OF SCOPE

- Issues related to larger entity than your unit

- Policies and procedures that must be consistent within the larger entity

- Individual performance or behavioral issues

- Creating agreements that are not in compliance with contract, budget, regulations, law, regulatory requirements

Determine whether each scenario is in scope or out of scope for the UBT:

SCENARIO	IN SCOPE?	OUT OF SCOPE?
Internal Medicine is working on implementing a reward and recognition plan that includes special parking spaces in the facility lot.		
The Orthopedics Department is independently working to improve the way Radiology takes care of the patients Orthopedics sends over to them.		
OB/GYN is creating a new scheduling system for its receptionists.		
The Regional couriers want to engage in a PDSA process to look at re-designing the routes they use for deliveries around the region.		

UBT Roles and Responsibilities

To better understand what should occur with the UBT process, let's take a look at the roles and responsibilities of each of the following:

- TEAM MEMBER
- CO-LEADS
- SPONSORS

Team Member Roles and Responsibilities

As part of a team member's roles and responsibilities, he or she will:

- Attend and participate in meetings

- Complete UBT training

- Represent interests and perspectives of others — not just your own

- Use UBT processes collaboratively and with an open mind toward mutually acceptable results

- Maintain open, direct and respectful communication

- Support partnership principles, guidelines and goals

- Communicate regularly with staff

- Honor confidentiality agreements

- Actively support all team decisions

- Develop regular two-way communication with staff, stakeholders and sponsors

- Honor confidentiality agreements

- Actively support all team decisions

> "**Example** is not the main thing in influencing others. It is the only thing."
>
> Albert Schweitzer

What do you think it means to your team to practice honest, direct and respectful communication?

_____

_____

_____

_____

_____

_____

What are some partnership principles that are important to you?

_____

_____

_____

_____

_____

_____

What does it look like when someone doesn't really agree with decisions?

_____

_____

_____

_____

_____

Co-Lead Roles and Responsibilities

Co-leads should balance the following:

- Advocate for partnership success

- Communicate early and often

- Prepare for meetings and huddles

- Use appropriate meeting management tools

- Troubleshoot where appropriate

- Act as point person for information

- Keep team records

- Ensure team is following charter and charter is relevant

- Make off-line decisions when needed

- Build relationships and share expectations with co-lead partner(s)

"Leadership is communicating to people their worth and potential so clearly that they come to see it in themselves."

Stephen Covey

As co-leads, how do you think you will advocate for partnership success?

_____

_____

_____

_____

_____

_____

Do you think the team will notice when co-leads aren't communicating early and often with each other and with sponsors?

_____

_____

_____

_____

_____

_____

What's the benefit of jointly preparing for meetings?

_____

_____

_____

_____

_____

_____

Sponsor Roles and Responsibilities

Sponsors are the individuals representing the next higher level of authority for both labor and management. Sponsors should complete the following:

- Support the Partnership

- Keep UBT visible and aim for success

- Authorize, legitimize and demonstrate ownership for change

- Allocate resources for success

- Know who is doing what

- Walk the talk!

What are some examples of resources a sponsor might allocate?

_____

_____

_____

_____

_____

What does it look like when the sponsor is "walking the talk"?

_____

_____

_____

_____

_____

NOTES ON ROLES AND RESPONSIBILITIES

You can find more information about Sponsors in the UBT Start-Up Tool Kit, Tab 8: Working with your Sponsor or at www.lmpartnership.org/ubt/ starting-and-running-a-ubt/sponsors-ready-set-go

Working Styles

You will be working with UBT members and UBT staff with different working styles and backgrounds. Your working style may be very different than your co-lead's style. To work as efficiently and effectively as possible, it's helpful to assess your working style to determine the way you prefer to work.

Knowledge of Self—Working Style Self-Assessment

Teams are made up of individuals with different work experience and backgrounds, each with his or her own particular working style. There are many different working styles to think about, and every person's individual working style plays a key role in the team's development and success.

WORKING STYLE QUESTIONNAIRE

PURPOSE: The purpose of this brief questionnaire is to get some idea of your preferred or dominant working style.

OUTCOME: There are no right or wrong answers and you may find that several choices appeal to you because you prefer a combination of styles.

INSTRUCTIONS:

1. Complete the questionnaire on the next page.

2. Read each statement and order your responses with the numbers "1," "2," "3" or "4," with "1" being the response that BEST describes you and "4" being the response that LEAST describes you. Use whole numbers only (no fractions or decimals).

3. You have approximately 15 minutes to complete the questionnaire.

4. Once you have completed the questionnaire, transfer the results to the score sheet on PAGE 34 in your *Participant Guide.*

WORKING STYLES QUESTIONNAIRE

1. When performing a job, it is most important to me to

A. _____ do it correctly, regardless of the time involved.

B. _____ set deadlines and get it done.

C. _____ work as a team, cooperatively with others.

D. _____ demonstrate my talents and enthusiasm.

2. The most enjoyable part of working on a job is

A. _____ the information you need to do it.

B. _____ the results you achieve when it's done.

C. _____ the people you meet or work with.

D. _____ seeing how the job contributes to progress.

3. When I have several ways to get a job done, I usually

A. _____ review the pros and cons of each way and choose.

B. _____ choose a way that I can begin to work immediately.

C. _____ discuss ways with others and choose the one most favored.

D. _____ review the ways and follow my "gut" sense about what will work the best.

4. In working on a long-term job, it is most important to me to

A. _____ understand and complete each step before going to the next step.

B. _____ seek a fast, efficient way to complete it.

C. _____ Work on it with others in a team.

D. _____ keep the job stimulating and exciting.

5. I am willing to take a risky action if

A. _____ there are facts to support my action.

B. _____ it gets the job done.

C. _____ it will not hurt others' feelings.

D. _____ it feels right for the situation.

YOUR WORKING STYLE SCORE SHEET

Transfer the answers from the WORKING STYLES QUESTIONNAIRE onto the scoring grid below by entering the number you chose for each letter. Next, total the columns and record the answers in the space provided.

1.   A._____   B._____   C._____   D._____

2.   A._____   B._____   C._____   D._____

3.   A._____   B._____   C._____   D._____

4.   A._____   B._____   C._____   D._____

5.   A._____   B._____   C._____   D._____

TOTALS: A._____   B._____   C._____   D.

Your LOWEST score is your preferred or dominant working style. In the case of a tied score, you should pick the working style you feel is most like you.

A = ANALYTICAL

B = DRIVER

C = AMIABLE

D = EXPRESSIVE

My preferred working style is _____.

A copy of the **Working Styles Exercise** is in the UBT Start-Up Tool Kit, Tab 9: Appendix/Additional Resources

WORKING STYLE CHARACTERISTICS

A — ANALYTICAL	B — DRIVER
• Cautious actions and decisions	• Takes action and acts decisively
• Likes organization and structure	• Likes control
• Dislikes involvement with others	• Dislikes inaction
• Asks many questions about specific details	• Prefers maximum freedom to manage self and others
• Prefers objective, task-oriented work environment	• Cool and independent, competitive with others
• Wants to be accurate and therefore relies too much on data collection	• Low tolerance for feelings, attitudes and advice of others
• Seeks security and self-actualization	• Works quickly and efficiently by themselves
C — AMIABLE	**D — EXPRESSIVE**
• Slow at taking action and making decisions	• Spontaneous actions and decisions, risk taker
• Likes close, personal relationships	• Not limited by tradition
• Dislikes interpersonal conflict	• Likes involvement
• Supports and "actively" listens to others	• Generates new and innovative ideas
• Weak at goal setting and self-direction	• Tends to dream and get others caught up in the dream
• Demonstrates excellent ability to gain support from others	• Jumps from one activity to another
• Works slowly and cohesively with others	• Works quickly and excitingly with others
• Seeks security and inclusion	• Not good with follow-through

USING YOUR STYLE WITH OTHER STYLES

		YOUR STYLE			
		ANALYTICAL	DRIVER	AMIABLE	EXPRESSIVE
OTHER STYLES	ANALYTICAL	Establish priority of tasks to be done. Commit to firm time frames for your work and stick to them.	Take a deep breath, relax and slow down. With analyticals, you need to demonstrate that you have considered all or most options or outcomes before moving ahead.	Cut short the social hour and get right down to the specifics. The more information you have to support your position, the better.	Translate your vision into specific tasks or goals. Involve analyticals in research and developing the details of the plan of action.
	DRIVER	Organize your work around major themes; prepare "executive summaries" with headings or bullets that state the conclusions first and supporting data and analysis second.	Remind each other of your similarities and your need to adopt qualities of the other styles.	Don't take anything personally. Getting results is what counts with drivers; be decisive and dynamic. Emphasize the bottom line.	Take time to think about what your vision really is; translate it into action steps with objectives and timelines.
	AMIABLE	Start off on a personal note; gravitate to project specifics and expectations; emphasize the greater good of the project.	Spend time up front gaining trust and confidence; be inclusive. Be sure to be specific about deadlines, even when it seems obvious.	Laugh with each other about how important it is being relational. Then focus on what we really need to accomplish here and do it.	Tell them how important the team concept is to making your vision a reality. Give the amiable the job of building the team to make the dream come true.
	EXPRESSIVE	Jazz up your presentation; try to think of the BIG picture. Involve the expressive in developing the "vision" or marketing of the plan.	Be patient and try to work with a flip chart to harness creative spirits. Emphasize time lines and due dates. Build in flexibility to allow the free rein of creativity.	Engage the expressive with your appreciation of their vision and creativity. Harness this energy to deal with the pesky but important details that only they can address.	Remind each other of your tendency to generate a lot of ideas without thinking through how to implement them.

What are the opportunities and challenges we have with our working styles as co-leads?

_____

_____

_____

_____

_____

What do others need to know about our style in order to effectively work with us?

_____

_____

_____

_____

_____

What are our challenges in working with each of the other working styles?

_____

_____

_____

_____

_____

We all have a few elements of all the styles. Do you think this is an advantage or disadvantage?

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Why is it a good thing your team has people from all these different styles?

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Co-Lead Practices for Success

A healthy working relationship between team co-leads is critical to the overall success of their team. Get to know your partner and what's important to them.

YOUR DEMONSTRATION OF PARTNERSHIP SETS THE TONE FOR THE WHOLE TEAM.

Share expectations and set working agreements around:

- communication preferences (how you like to be communicated with);
- how you like to be acknowledged or rewarded;
- how you handle conflicts constructively;
- personal pet peeves;
- what you will share with each other;
- your strengths and weaknesses; and
- where you would appreciate support.

How you balance your interaction with the team is important, too.

- Check in with your co-lead early and often.
- Don't let your co-lead be caught by surprise.
- Sit next to your co-lead during meetings (vs. promoting separation of labor and management).
- Use an interest-based approach to resolving issues with each other.
- Seek regular feedback from one another and group members about what's working well and what would help make the relationship/process/results more effective and satisfying for all.

(continued)

> "Coming together is a **beginning**, staying together is **progress**, and working together is **success**."
>
> Henry Ford

- Model good meeting management practices and develop shared responsibility among all team members for effective meeting behaviors.

- Demonstrate appreciation for specific positive actions and behaviors.

- Celebrate successes, both large and small.

It's okay to disagree, so consider:

- talking about how you want to manage anger and strong emotions; and

- jointly deciding on a consistent approach to issues where there will be disagreement.
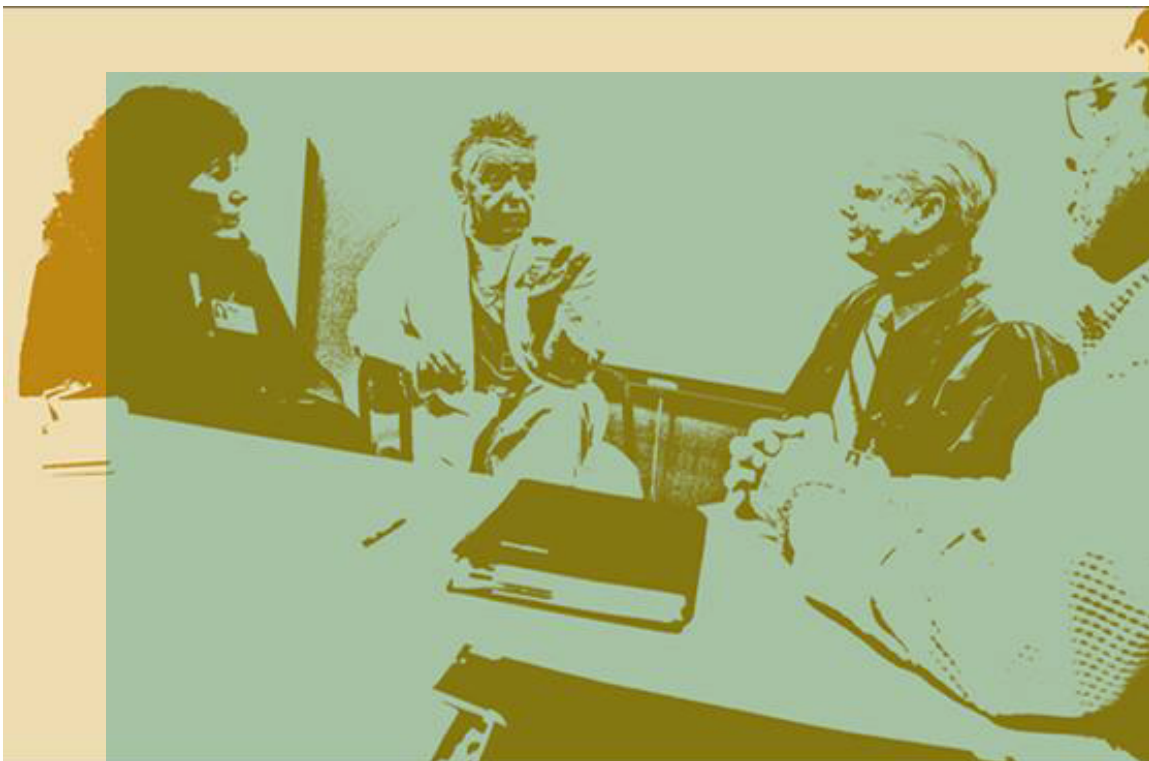
BUILDING TRUST IN A TEAM

Trust is an essential part of establishing relationships with co-chairs, team members and sponsors. Have a conversation about what you can do to build trust using the ideas below, and add your own.

Forgive mistakes and communicate their impact

Don't assume that mistakes are intentional

Presume goodwill

BUILDING TRUST IN A TEAM

Learn about differences and how to work together

Review and assess partnership behaviors together (How are we doing?)

Create an environment that supports trying something new

Do what you say you'll do

Ask for and offer feedback (Receive it well)

Be trustworthy (What does that look like?)

Take the risk of speaking frankly

Measurable Communication Methods

Please note that more than one method can be utilized, and to maximize successful out-comes,
two-waycommunicationthatprovidesface-to-faceopportunitiesforquestionsandanswers should always be included.

ONE-WAY COMMUNICATION	GRAY ZONE	TWO-WAY COMMUNICATION

· Bulletin Boards
 	
· Newsletters
 	
· Meeting Minutes
 	
· Suggestion Boxes
	· Presentations
	
	· Meetings
	
	· Evaluations
	
	· Conversations
	
	· E-mail
	
	· Surveys
		SPECIFIC QUESTIONS AND RECORDED ANSWERS
		
		· Small group huddles
		  · Labor with labor
		  · Labor with management
		  · Management with management
		
		· Individual converrsations
		
		· Structured Q&A
		
		· Interactive staff meetings

PROS: · Lots of information can be included and made available to many people · It is usually cost efficient and can also take less time to do	PROS: · Can be efficient and can reach more people in a shorter amount of time · Allows some opportunity for feedback	PROS: · More informative and inclusive and provides opportunity for immediate feedback · Models partnership behavior and help shape the work of the team
CONS: · Lose opportunity for discussion · Cannot test for reaction · Limits feedback · No way to know whether people reviewed information	CONS: · May be less timely · Everyone might not be included or have access · No way to be certain if people understand the information · Meaning can be lost and subject to interpretation	CONS: · More time consuming · Could lead to inconsistent messaging if not structured · Requires a higher level of understanding and commitment · Can be risky

Communication/Stakehold Summary for UBT _____ (date)

Tell Messages
Key Messages to tell staff about
1.
2.
3.
4.
5.

Ask about
Key questions to ask staff
1.
2.
3.
4.
5.

Name	Date talked to	Initials	Comments
1			
2			
3			
4			
5			
6			
7			
8			
9			

Communicating the Case for Change

Three ways to Communicate to Engage and Bring Energy

Rational

The extent to which we communicate that there is a compelling reason for working in Unit Based Teams. This is a logical business decision that will bring excellent outcomes.

Emotional

How we communicate to connect with the teams' feelings and sentiments about providing the best care to the members creating a heart connection.

Social

Explain that working Unit Based Teams gives us the best opportunity to meet our social mission. This work is "the right thing to do."

> "Management works in the system. Leadership works on the system."
>
> Stephen R. Covey

You can find more information about **The Case For Change** in the UBT Start-Up Tool Kit, Tab 1: Introduction and Context Setting or at www.lmpartnership.org/ubt/how-to-make-team-decisions/why-do-we-need-to-change

Appeal to the Rational reason around the Case for Change?

_____

_____

_____

_____

_____

_____

Appeal to the Emotional reason around the Case for Change

_____

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Appeal to the Social reason around the Case for Change

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Rapid Improvement Model

3 QUESTIONS HELP US IMPROVE

1. What are we trying to accomplish?

2. How will we know that a change is an improvement?

3. What change can we make that will result in improvement?
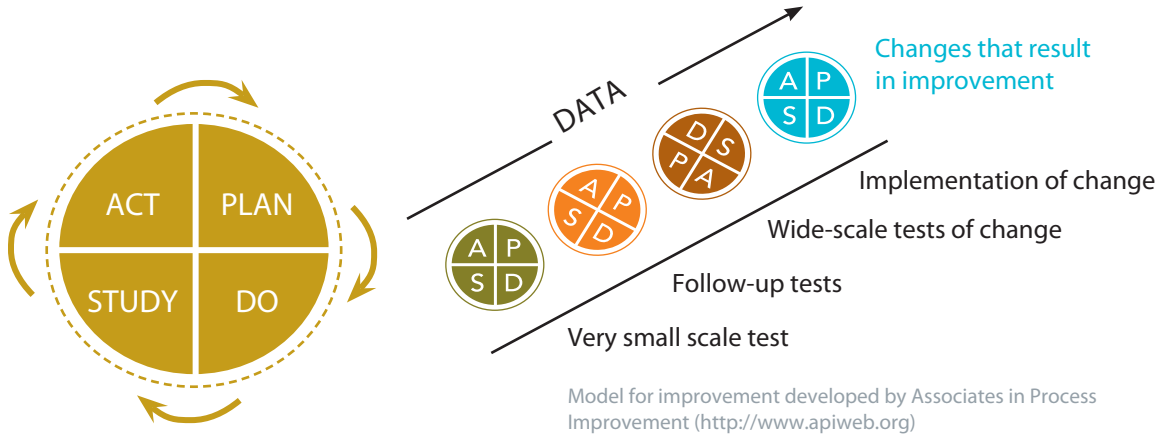
DATA

Changes that result in improvement

Implementation of change

Wide-scale tests of change

Follow-up tests

Very small scale test

ACT   PLAN

STUDY   DO

Model for improvement developed by Associates in Process Improvement (http://www.apiweb.org)

ACT
- What changes are to be made?
- Next cycle?

PLAN
- Objective
- Predictions
- Plan to carry out the cycle (who, what, where, when)
- Plan for data collection

STUDY
- Analyze data
- Compare results to predictions
- Summarize what was learned

DO
- Carry out the plan
- Document observations
- Record data

RIM AND PDSA NOTES

You can find more information about RIM and PDSA in the UBT Start-Up Tool Kit, Tab 4: Performance Improvement or at www.lmpartnership.org/ubt/rapid-improvement-model

Process Mapping

The first step in making an accurate assessment of what is going on is to create a process map.

Begin with a quick "walk through" of the entire process, to get a sense of the flow and sequence of steps. "Pin yourself to the problem" as if you were the staff or patient

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_____

_____

Go back and gather information at each step (data, stories, etc)

_____

_____

_____

Follow along the actual pathways of material and information yourself

_____

_____

_____

Collect relevant current-state information while "working through" using a data collection tool

_____

_____

_____

Map the whole process yourself (or as a team), even if several people/departments are involved and multiple hand-offs occur

_____

_____

_____

THE POINT OF MAPPING IS NOT THE MAP. IT IS UNDERSTANDING THE FLOW OF INFORMATION AND MATERIAL.
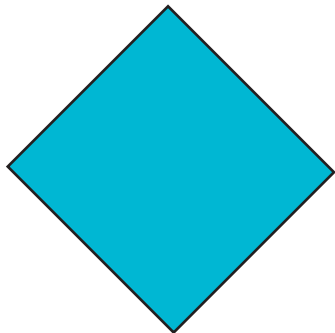
Process Map an Example

There are Four important figures on a Process Map

Boxes show Actions or Tasks

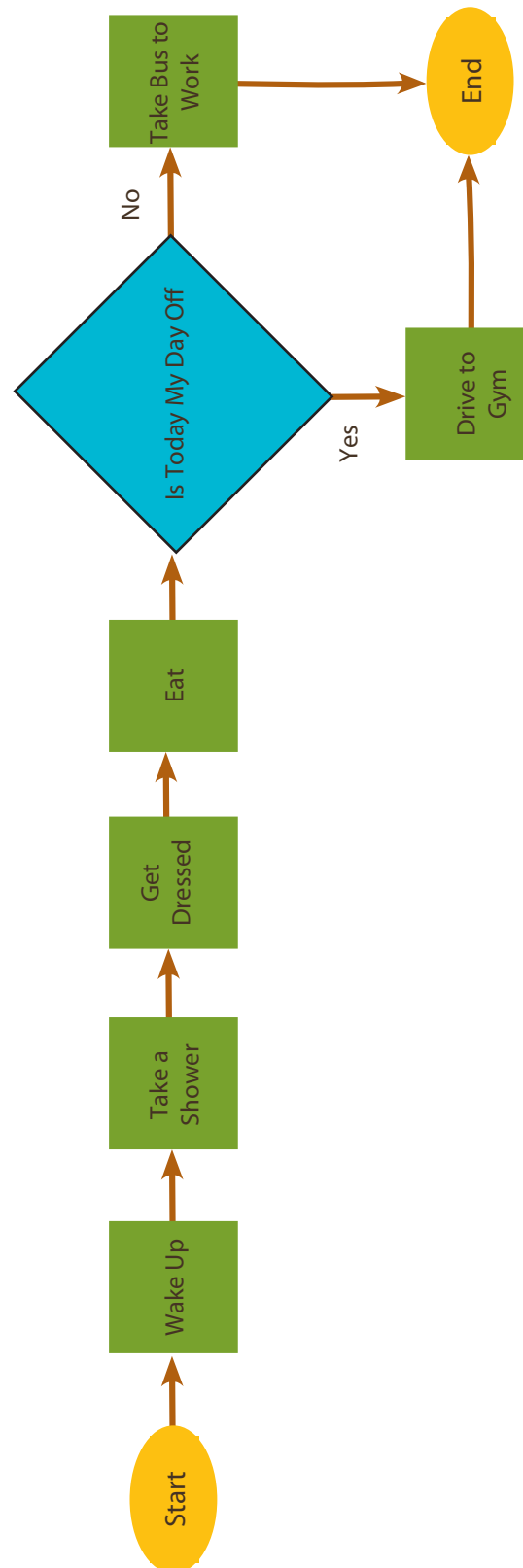Arrows show the Direction of Flow

Diamonds indicate "Structural" Decisions

Ovals mark the Beginning and the End(s) of the Process

Process Map an Example

Interest-Based Problem Solving for Issue Resolution

STEP 1: DEFINE THE PROBLEM

- Develop a question with:
  - Subject—what the problem is about
  - Issue—what is to be resolved
- Begin with "How might we" or "What"
- Cannot be answered with "yes" or "no"
- Contains no solutions (this is in Step 3)
- Contains no accusations or inflammatory wording
- Contains no interests

STEP 2: DETERMINE INTERESTS

- Definition of interests—needs, concerns and qualities desired
- Identify and chart each party's separate interests
- Discuss separate interests with entire group
- Identify common interests (same, similar or can be supported by other party)

"Life is **change.** Growth is optional. Choose wisely."

Karen Kaiser Clark

STEP 3: DEVELOP OPTIONS

- •Review option-generating methods

- Brainstorming

- Best practice

- Expert panel

- Straw design

- Choose method best suited for the issue, considering:

- Issue complexity

- Time availability

- Skills of group members

- Level of facilitation available

STEP 4: SELECT A SOLUTION

- Screen options (eliminate duplicates, grossly flawed or impossible)

- Shorten the list (clarify, determine interests/priorities of group)

- Ideally shorten list to 5–7 options

- Develop standards or criteria by which to evaluate remaining options

- Test options by comparing with standards/criteria

- Allow for discussion and advocacy by group

- Reach the optimum solution(s) through consensus

You can find more information about **Interest-Based Problem Solving** in the UBT Start-Up Tool Kit, Tab 4: Performance Improvement or at www.lmpartnership.org/ubt/how-to-make-team-decisions/ interest-based-problem-solving

APPROPRIATE LMP TOOL USE

When the issue is confusion on how to work on small tests of change to improve clinical quality and save on costs, the team should use PDSA

_____

_____

_____

_____

When the key issue is difficult team dynamics or communication problems, the team should use issue resolution using Interest Based Problem Solving

_____

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If the key issue is difficulty implementing process change due to reluctance of staff or concerns of job changes, the team could use Interest Based Problem Solving

_____

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_____

NOTES ON LMP TOOLS

Consensus Decision Making

Responsibilities of the Standout

- Stay involved with the group and do not yield to pressure

- Clearly explain the reasons for blocking consensus

- Offer a solution that would remove the block

Responsibilities of the Group

- Support the standout

- Consider the solution offered by the standout

Definition:

"Consensus is a form of group decision making. Everyone discusses the issues to be decided so that the group may benefit from the knowledge and experience of all its members. In order for consensus to occur, every member of the group must be able to support the decision."

(From the Labor Management Partnership Pathways to Partnership: Glossary of Terms)

How to Use Consensus Decision Making

- The final decision is not made by taking a vote.

- The input and ideas of all participants are gathered and synthesized to arrive at a final decision acceptable to all after everyone's interests, concerns and issues have been "laid on the table."

- Everyone works with the same information, actively discussing the issues surrounding the decision, with everyone benefiting from the knowledge and experience of all involved.

- The group as a whole makes the decision, coming to a final agreement that every individual or party can honestly support, even if it is not his or her first choice.

Consensus Test

We test to see whether consensus exists by asking each member of the decision-making group if they can answer YES to the following questions:

- Have you had the opportunity to voice your opinions?

- Do you think the group has heard you?

- Is the decision one you can live with and actively support as the best possible path of action at this time, even if it is not your first choice?

Important Points to Remember

- Respect the different perspectives of others to understand the issue fully.

- Listen with at least as much dedication and commitment as you speak.

- If there is a "standout" to consensus agreement in the group, refer to the responsibilities of the standout and responsibilities of the group to help move forward.

- If the group is "stuck," get some advice about ways to move beyond it. Before you begin an issue, it may be best to determine how the decision will be made if the group truly cannot move forward and consensus cannot be reached.

"The ear of the leader must ring with the voices of the people."

Woodrow Wilson

CONSENSUS DECISION MAKING—POINTS TO CONSIDER

1. What do you do if there is not full participation from the team?

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_____

2. Why is it not called a vote?

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3. Do you always need to show thumbs-up to determine whether you have consensus in the team?

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4. What do you do when you have a standout situation?

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5. Do the co-leads have additional responsibilities to the standout?

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You can find more information about Consensus Decision-Making in the UBT Start-Up Tool Kit, Tab 4: Performance Improvement or at www.lmpartnership.org/ubt/how-to-make-team-decisions/consensus-decision-making

Fully Functioning UBTs

Regions may have teams at different stages of evolution. Below is a description of a fully functioning UBT.
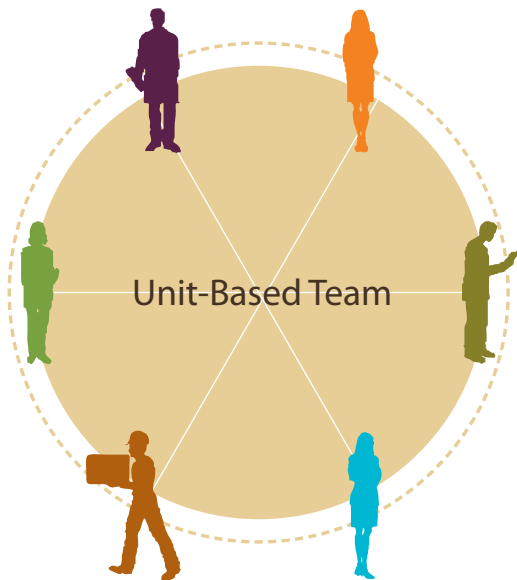
- Focus on core operational and business issues that lead to performance improvement in alignment with regional priorities and strategy.

- Success measures developed in the UBT in service of overall regional performance goals.

- High levels of trust.

- Focus on cultural components of the team, including trust, working relationships and mindset.

- Engagement of all team members in decision making and performance improvement.

- High-functioning system of communication.

- Co-leads' role as coach, facilitator and mentor.

Unit-Based Team

Which of these attributes does your team currently demonstrate? What did it take for your team to achieve those attributes?

_____

_____

_____

_____

Which of these attributes does your team currently lack? What are some barriers that prevent your team from acquiring these attributes?

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NORTHWEST 5 STEP UBT DEVELOPMENT PATHWAY

Unit/Team name:		Co-Leads:		Date:
Minimally Skilled UBT Level 1	**Foundational UBT Level 2**	**Developmental UBT (Target) Level 3**	**Deployed UBT Level 4**	**High-Performing UBT (Stretch) Level 5**
Unit is learning what a unit-based team is and how unit-based teams work.	Team is establishing structures and beginning to function as a unit-based team.	Team is demonstrating progress on engagement and making improvement.	Team has joint leadership, engagement of team members, and improved performance.	Team is fully successful, and collaborating to improve and sustain performance against targets.
Team has some or all of these characteristics: • Team and Co-Lead Orientation is scheduled • Contact between co-leads and resource team members has begun • Team orientation is complete • Co-lead orientation is complete	Team has some or all of these characteristics: • Staff meetings are occurring as UBT meetings (and representative team meetings is rep model is in use) • Co-leads are meeting to plan staff (team) meetings (and rep meetings if in use) • Co-leads have received or are receiving coaching in; PDSA, meeting tools, use of data, team roles, facilitation, planning, problem solving and/or leadership • Co-leads are leading UBT/staff meetings (and rep team meeting if in use) • Team has been exposed to unit data and goals	Team has the following characteristics: • Regularly scheduled team and co-lead meetings occur • Co-leads are co-planning and facilitating outcome based meetings and sharing the leader role • Co-leads have open, honest and frequent communication and work on their facilitation skills • Co-leads discuss and present data and unit goals to team • Teams use communication tools, PDSA maps and other RIM tools to guide their work • Improvement work has begun • Employees either participate in team meetings or know how to contribute to team progress and decision-making • 50% of team members can report what their team is improving and their role	Team has all of level three characteristics plus: • Unit performance data is discussed by team regularly • Team has completed at least one measurable performance improvement using PDSA or other tools • Team is actively engaged in continuing performance improvement aligned with unit goals • Co-leads co-facilitate team meetings using outcome-focused agendas, effective meeting skills and strategies to engage all team members in discussion and decision-making • Team members (in addition to co-leads) are sharing responsibility for unit improvement work • Team members (all team) know the unit goals and can discuss improvement projects underway • 80% of team members can report what their team is improving and their role	Team has all of level four characteristics plus: • All team structures (co-leads, meetings, agendas, use of data, unit goals) are working effectively • Team has achieved measurable positive results on unit goals • Team members report joint accountability for performance of the unit • Team regularly reviews data, improves performance, and implements improvements • Co-leads and teams can use problem-solving skills to assess issues and resolve problems collaboratively • Unit culture allows team to respond to changes quickly and manage transitions well • Co-leads continue to develop and improve their leadership and facilitation skills and are mentoring these skills in other team members • Co-leads and/or team is able to mentor other teams • 100% of team members can report what their team is improving and their role
Supported primarily by UBT Resource Team Consultant and/or Specialist		Supported jointly by immediate sponsor and Resource Team	Supported primarily by immediate sponsor with minimal or no contact with Resource Team	

HIGH-PERFORMANCE LEVERS

High-performing work units have six distinct characteristics.

VISION/STRATEGY	PEOPLE	PROCESS
1.Sense of Shared Purpose · Clear, inspiring goal(s) · Sense of mission, purpose and pride in creating a great place to work	3.Team Knowledge and Skills · Subject matter expertise Functional knowledge · Intrapersonal/Interpersonal skills	5.Clear Governance and Metrics · Decision rights and processes · Roles and accountabilities · Success measures
2.Alignment on Strategy and Execution · Clear desired outcomes, related strategies and execution approach · Alignment with the broader regional strategy and desired outcomes	4.Strong Team Dynamics · Trust · Feedback · Focus on results · Courageous conversations · Productive debate · Accountability for results and team morale	6.Effective Norms and Practices for Interactions · Interaction excellence (e.g., framing, norms, clear agreements) · Team communication system · Stakeholder communication

ACTIVITY—HIGH-PERFORMANCE UBT LEVERS

· Watch the video

· Look for behaviors that demonstrate the six "levers" or characteristics of a high functioning Unit Based Team

ACTIVITY—HIGH-PERFORMANCE UBT LEVERS

What things. can you do as a co-lead to help your team achieve high-performance UBT levers?

- Divide into three groups.

- Each group will be assigned two high-performance levers.

- Describe what the lever would look like for a fully functioning UBT.

- Identify what things you can do to help your team achieve these levers.

- List your responses on a chart pad.

- Take 20 minutes.

- Debrief and provide feedback.

"For even in the moment, moments, of our knowing, it was changing: was never the same from moment to moment, from second to second: was always leaving."

Gwendolyn Brooks, poet, 1972

UNIT-BASED TEAMS:
THE ROAD TO SUCCESS

$(L+M)^P$
The Power of Partnership

PULMONOLOGY DEPARTMENT OPENS ACCESS

In Cleveland

In early 2008, only 10 percent of Kaiser Permanente's Ohio members secured an appointment with the pulmonary specialty department within two weeks of their first request.

By August, the department reported a record high of 89 percent of members being seen within two weeks.

The difference was a unit-based team.

The team noticed patients were scheduled in the wrong appointment slots. Patient follow-ups were scheduled for consults, which take twice as long as follow-ups. Members needing consults were crammed into follow-up slots.

The UBT also noted cancellations and no-shows which left vacant slots.

The team tested different solutions and immediately saw results—jumping to 45 percent access after the first month. Here's what they did:

- Collaborated with member services and primary care departments to ensure agreement about consults and follow-ups.

- Increased the consultation slots by having routine follow-up appointments handled by primary care physicians.

- Minimized unused appointments by listing patients who could be moved into a vacated slot.

- Decreased no-shows by calling some members ahead of time to confirm appointments.

- Transferred some in-person visits to phone appointments.

Based on what you've read, what challenges did the team face?

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How did the team overcome these challenges?

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What were the results of their efforts and how were they measured?

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ACTIVITY—YOUR TEAM'S ROAD TO SUCCESS

As a pair, discuss your UBT:

- What would success look like for your team?

- What would the results look like?

- What barriers might need to be removed to get these results.

- Spend 10 minutes talking and be ready to share with the group.

" For it is not **light** that is needed, but **fire**; it is not the gentle **shower**, but **thunder**. We need the storm, the whirlwind, and the earthquake."

Frederick Douglass, abolitionist leader, 1852

UNIT-BASED TEAMS: THE ROAD TO SUCCESS

Key Needs of a Team

A coach or team leader—to be effective and establish a foundation for success—needs to understand how to coach the key needs of a team.

Every newly formed or established team will have key needs that should be addressed.

The diagram shows "Coach/Co-Leads" at the center with arrows pointing to: Constructive Conflict Resolution, Common Goals, Leadership, Respect for Differences, Interaction and Involvement of All Members, Mutual Trust, Attention to Process and Content, Power within Group to Make Decisions, Open Communication, Maintenance of Individual Self-Esteem.

What are some of the key needs of your team?

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What might be a risk or drawback of not having two-way communication and an exchange of ideas between coach and team members?

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How do you anticipate your team's needs will change over time?

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What things will team members need early on vs. later in their development?

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Journaling

Think about specific needs for your UBT and how you might address those needs. What key needs likely will be the most challenging to address?

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"Pressure can change you into something quite precious, quite wonderful, quite beautiful and extremely hard."

Maya Angelou, writer, 1985

Coaching to Support UBTs

When we think about coaching UBTs, we need to understand what we are coaching toward. This involves:

- Maintaining partnership principles

- Promoting partnership behaviors

- Achieving the goals of the unit-based team

- Using such partnership tools as CDM and RIM

It is important that we model positive leadership skills through our behavior.

Coaching means ongoing guidance and support of UBTs as they work toward improved performance and results. Coaching isn't just a one-time event that we do and then forget about. It's something we all do all the time. What are some desired results for coaching UBTs?

> What are the potential risks of not knowing what you're coaching toward?

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Qualities of a Good

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Qualities of a Bad Coach

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COACHING TO SUPPORT UBTs

Mindsets That Enable Success	Mindsets That Create Barriers
"Team" Mentality I put the needs of the team above my own needs and I feel connected to our shared purpose.	**"Self" Mentality** I work to maximize the results I produce as an individual; therefore, I place my own interests above my team's interests.
Focus On Results, Manage Risks In every interaction, I focus on producing the required results and on making the decisions needed, while managing the level of risk.	**Focus On Process, Minimize Risks** I need to make sure the organization and I are never at risk, so I spend a lot of time selecting the right process to follow. I adhere to the process in painstaking detail to eliminate the possibility of risk to me and the organization.
Alignment I am prepared to support a team decision as if it were my own, even if the entire team and I did not unanimously agree.	**Agreement** To support a team decision, I must feel it was my first choice as well as the choice of the group. We cannot move forward if we do not all unanimously agree.
Trust Others I trust the people in the organization and I engage in interactions that help me build trust when trust is lacking.	**Control Others** Whenever I interact with others, I try to control the process they follow and the results they produce. I prefer not to address instances where trust is missing, and I compensate by managing details.
Action There are always productive actions I can take, even before all the related questions are fully answered. I am empowered to make things happen.	**Perfection** It is more valuable to spend time analyzing situations than to take action quickly ("analysis paralysis"). I need permission to move forward.
Can Do This is how we can make it happen.	**Can't Do** This is why it can't work.

What other mindset (positive or negative) might affect a UBT? Have you ever encountered other mindsets?

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COACHING CONVERSATION MODEL FOR INDIVIDUAL OR TEAM CONCERNS:

ASK: What is the key issue?

ASK: What would you like to see happen, what is your desired end result?

ASK: What is getting in the way of getting your desired end result? What are the barriers in the <u>situation</u>, what barriers in the <u>team</u>, what barriers in <u>your</u> behavior?

Brainstorm actions to take to remove the barriers and get the desired end result.

You can find more information about Coaching in the UBT Start-Up Tool Kit, Tab 6: Coaching or at www.lmpartnership.org/ubt/coaching-and-feedback

Wrap Up Checklist

Please remember to do the following:

- Take a minute and calculate your gain score
- Please review your working agreements with your Co-Lead partner
- Please make sure you signed the sign-in sheet

WE WANT TO THANK YOU FOR BEING CO-LEADS