|  | WORKSHEETUBT Kickoff Meeting |
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|  | PURPOSEThis tool helps co-leads to include all the key elements of a first UBT meeting as they jointly prepare the agenda.When to UseUse this tool when starting a new UBT and preparing for your first meeting.Who UsesCo-leads.How to UseReview the document when planning your first UBT meeting to ensure that you are including all the key elements for the agenda.

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| Checklist for a Successful Kickoff Meeting |
| [ ] | Review the sample agenda. Create your own version making any necessary modifications. |
| [ ] | Distribute a copy of the agenda to your team prior to your meeting. |
| [ ] | Meet with your co-lead to get clarity on who has what role during the kickoff. |
| [ ] | Prepare any materials that need to be presented to UBT members. |
| [ ] | Determine whether the sponsor needs to be present at the kickoff meeting. If so, create space at the beginning of the agenda for the sponsor to set the context of the UBT work for the organization. |

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|  | Sample Agenda 1

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| Meeting Name: | **Cascade Park Family Practice UBT** |
| Meeting Purpose: | Kick Off the Family Practice UBT |
| Date: | January 9, 2017 |
| Time: | 1:30 – 3:00 pm |
| Location: | Conference Room 2 |
| Desired Outcomes: | * Set the context of UBT work.
* Establish an understanding of UBT roles and initial business objectives of this unit-based team. For example: increase service scores.
* Create UBT meeting ground rules and review the agenda.
* Establish an understanding of service scores (team members see the correlation between service delivery and patient satisfaction).
* Create a list of issues related to service in our unit.
* Reach agreement on solutions that can be implemented immediately.
* Create a list of action items and communication needs.
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| Topic (What) | Process (How) | Who | Time |
| **Opening:*** Context
* Desired outcome
* Agenda
* Roles
* Safety tip
 | **Present:*** Check for understanding
* Check for agreement
 | * **David**Labor co-lead
* **Rose**Management co-lead
 | 30 minutes |

Sample Agenda 2

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| Topic (What) | Process (How) | Who | Time |
| **Service Performance Update** | * Review and explain the data
* Check for understanding or questions
 | Rose | 15 minutes |
| **Service Issues** | * Brainstorm
 | David | 15 minutes |
| **Possible Solutions** | * Narrow the brainstorm list and agree on solutions that can be implemented immediately
 | All | 10 minutes |
| **Next Steps** | * Action items
* Communication needs
* Agree on action plan
* Agree on what needs to be communicated, to whom, by when, and how
 | Rose | 10 minutes |
| **Meeting Evaluation** | * Conduct plus/delta
 | David | 5 minutes |

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