SECTION 1
INTRODUCTION

LABOR MANAGEMENT PARTNERSHIP

Introducing the Sponsor and Leader Resource Guide for UBTs

Fostering a High-Performance Culture

Kaiser Permanente *is our country's first and largest nonprofit health care system. Our integrated model of care, commitment to improve the health of our members, patients and communities, and historic partnership with labor are a model for health care. But, as we know, our world is changing. We're moving quickly to meet today's challenges and take advantage of real opportunities. Every employee, manager and physician will play a part in that transformation.*

Unit-Based Teams *are part of the solution. They engage the skills, knowledge and experience of every employee and physician. And they're getting results—making changes in service and operations, reducing waste, simplifying work processes and improving performance and job satisfaction. These changes add up to high performance and a superior member/patient experience. As a sponsor or leader, we need your engagement and support to ensure that cultural, behavioral and operational changes are being delivered by our UBTs.*

Consider this Resource Guide *the "CliffsNotes" for your role as a sponsor of UBTs. It contains highlights of a number of key programs at Kaiser Permanente and can serve as a companion to other learning programs. The purpose of this* Guide *is threefold: to clarify how the role of leaders is changing, to provide tools that support leaders in this transition and to provide information about what UBT co-leads and team members are learning.*

The overall goal is to improve the effectiveness of sponsorship across our organization.

Without effective sponsorship—coaching, facilitation, guidance, accountability—from leaders, our improvement efforts may founder or not produce results quickly enough. On our path to becoming a high-performing organization we take things one step at a time, always putting the patient and member first. Please dig in, collaborate with your colleagues and show the world that Kaiser Permanente continues to be the model for U.S. health care.

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What's in This Guide and How to Use It

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The purpose of the *Sponsor and Leader Resource Guide for UBTs* is to build sponsorship capability and capacity in leaders to support high-performing unit-based teams. The *Resource Guide* is filled with useful job aids, tools and information to support leaders in their roles as sponsors, coaches and facilitators.

In this *Resource Guide*, we define sponsors as those to whom UBT co-leads report—meaning leaders across the organization for all three constituencies. For labor, where there is no direct reporting relationship, the targets are stewards, contract specialists, business agents and others who provide information and support to labor co-leads. For the medical group, it means chiefs and assistant medical directors. For management, the targets are directors and other managers who have UBT co-leads as direct reports.

The *Resource Guide* is organized around three key UBT sponsor competencies: coaching, engaging for transformation and performance excellence. The tools and information included were pulled together from many places across Kaiser Permanente, including regions and national initiatives. In addition, the *Resource Guide* is aligned with LMP and organizational learning materials.

The materials are generic and may be similar to things already being used in your region, though there may be variations. Given that regions have different structures and processes, not everything in this guide may apply to you. Please keep this in mind. Use the materials, when appropriate, to help you effectively guide the behaviors and actions of your teams in the transition to high performance.

You can find the full text version of the *Resource Guide* online at: **www.LMPartnership.org.**

Acknowledgments

This *Resource Guide* represents a collection of tools, information and suggestions for sponsors and leaders from labor, management and the medical group to use in their work supporting UBTs.

Thank you to the many people and departments who shared their materials and feedback to create this *Resource Guide*:

- The Permanente Federation
- National Workplace Safety
- National Service Quality
- National Performance Improvement
- National Workforce Development
- National Organization Effectiveness
- National Clinical Quality
- National Patient Safety
- National Management Development
- LMP Metrics and Analytics
- LMP Communications
- LMP Training and Development
- Northern California UBT Toolkit
- San Diego Service Area LMP
- Northwest LMP
- Colorado Organization Effectiveness Leadership Succession Management
- Leading for Performance Excellence

The time and participation of our pilot sites is greatly appreciated:

- San Diego Service Area
- Colorado
- Mid-Atlantic States
- Northwest

Special thanks to the following individuals whose comments and ideas served as the catalyst for the Guide:

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Alan Kroll
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Paul Rosenstein
CKPU National Coordinator, Southern California

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Provides a high-level overview of the structure of Kaiser Permanente, how and why KP is changing and the importance of working in partnership.

QUESTIONS ANSWERED IN THIS SECTION:

- How do I know what's in the 2005 National Agreement and what it really means?
- I am new to KP. How can I get a better understanding of the constituencies that make up Kaiser Permanente?
- How do I use the Value Compass in my work as a sponsor of UBTs?
- I've heard about the Case for Change—any ideas on how I can reinforce these concepts with my co-leads and UBTs?
- I need a simple definition of UBTs and who participates—where do I find this information?
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Illustrates the changing role of leaders for each constituency, what it means to be a sponsor and what new behaviors leaders must engage in.

QUESTIONS ANSWERED IN THIS SECTION:

- I see that my role as a leader is evolving. I want to make sure I am prepared. What skills and behaviors do I need to be effective?
- In a nutshell, what is the UBT sponsor role?
- What are the primary differences in how I should behave now as opposed to the past? What is expected and what will be rewarded?
- I want to start off on the right foot with my co-sponsors. I don't know them well. What should I do?
- How do I get started in my UBT sponsor role?

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SECTION 4.1 | Competency Tools: Coaching and Facilitation

Provides tools and job aids that enable sponsors/leaders to support UBTs and their co-leads.

QUESTIONS ANSWERED IN THIS SECTION:

- What is coaching? How do I do it?
- One set of co-leads is having a hard time working together. How can I help them start working effectively?
- In the past I think I have done a lot of "telling." I understand I need to do more "asking." How can I improve in this area?
- One of my UBTs seems to get mired in detail and has trouble making a decision and moving forward. How can I help them grow beyond this?
- I'm interested in helping my team learn to work with partnership decision making models. Are there some simple tools we can use?
- I am pretty comfortable giving feedback, but I don't always like getting it. I know that as a UBT sponsor I need to solicit feedback so I set a good example. Any ideas?

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- Being new to Kaiser, I don't know all the "unwritten rules." What are some of the key things I need to be aware of?
- My UBT is going through the normal team development process, but it seems to be uncomfortable for them. I want to help them understand what to focus on to avoid common problems.
- We are doing a lot of things well, but like many teams, I think we need to improve our communication. What kinds of suggestions can I make?
- We are making progress and have had a few successes. I want to reward my team, but I know from past experience that this needs to be done right. What are the guidelines?

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- I hear a lot of talk about metrics and performance improvement. What do I need to know as a leader?
- Everyone seems to need help with setting good goals. I want a simple tool to share with my team.
- My co-sponsors and I are interested in spreading some successful changes across our UBTs. We need advice about how to do this well.
- Metrics, measurement, data, reports—what do I need to know to support my UBT in performance improvement work? It will be a while before I can get to any training.
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- I want to ensure my teams are getting the training they need. Where do I find out about what's available and what we should be doing?
- I am aware that UBTs go through a developmental process. What can I do to help my teams understand this process and identify where they are at any given point?
- I'd like to know more about what a high-performing UBT looks like so I understand the target.
- Is there such a thing as a checklist for what I should do to support UBTs?
- I need a simple description of the UBT co-lead role.

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