It’s All About What You Leave Behind – Value and Sustainment
Your Presenters

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Workshop Overview

Nothing is more important than what you leave behind after process improvement work is complete.

During the ½ day workshop, you will learn about the critical success factors of process improvement.

We will share real-life examples of successfully creating and integrating tools and solutions – by being flexible with the methodology while still keeping an eye on outcomes.

We will also share examples of rolling the work of process improvement teams into existing facility operations and committees to foster implementation and sustainability.
Workshop Agenda

08:00 – Workshop Overview and Objectives
08:20 – Introductions and Expectations
08:30 – Value and Sustainment – System Perspective
09:15 – Value and Sustainment – Governance
10:00 – BREAK and Networking
10:30 – Value and Sustainment – Facility Perspective
11:45 – Wrap up and EVALUATIONS
Keys to Value and Sustainment

System perspective

- Standard tools and techniques with applicable training.
- Standard data analysis for monitoring and improvement.
- Stories and well-documented improvements to share and publicize, enabling spread throughout the facility and the system.

Governance

- Ongoing project visibility, oversight and accountability.
- Alignment of improvement efforts to system and facility governance.
- System-wide dashboards and shared metrics.

Facility perspective

- Institutionalizing improvements with standardized work and job training.
- Ongoing visibility and continuous improvement with Daily Kaizen, Metric Boards, and Daily Operational and Quality Huddles.
- Process ownership through engaged leaders.
“It is easier to act your way into a new way of thinking than to think your way into a new way of acting.”

- Dr. David Munch
The System Perspective
Standard Tools

- Tools to roll out across the system
  - Pharmacy Pyxis optimization tool
  - Phlebotomy data analysis tool
  - Lab TAT data analysis tool
Standard Data Analysis

- Dashboards, reporting
  - ED dashboard
  - Surgical dashboard
  - Governance / Quality dashboard
  - Nursing dashboard

- Data Analysis Training
  - Basic statistics; mean versus median versus mode
  - Reference materials
Sharing Stories

- Radical change; ‘blow it up’
  - Endo / PAT / Surgery example
  - Pharmacy redesign and eventual re-build
  - Combine Cath Lab and Same-Day patient flows
  - Bypassing Same-Day surgery
ABC Hospital ED 5S Project

Dates of Event: Nov. 29 – Dec. 2, 2010

Problem Definition

• Already applying some Lean concepts, but more consistency needed
• Lack of designated locations for portable equipment and carts
• Lots of storage spaces that tended to fill with unneeded items
• Some storage spaces underutilized, while other areas cluttered
• Cluttered counters and workspaces

Results

Baseline Dec-10
Score

Before

1. Wandering equipment, head of bed too close to wall
2. Cluttered storage
3. Cluttered cabinets and counters

After

1. Designated equipment locations and bed placement indicator
2. Only what is needed
3. Organized cabinets and clear counters
Governance
Purpose of Governance

- The Board sets the strategic direction of an organization and provides oversight and accountability in implementation.

- Effective governance leads to a healthy, high functioning organization.

- It is very important that all members of the team—whether on the medical staff, in management, or on the board—understand the role of governance and what constitutes effective governance.
The BIG Picture

Make it BIG
- Align your improvement effort to the appropriate internal system or facility level governing body (more than a pet project)

Build the case
- Present your opportunity with data to Chair(s) of committee (case for change)
Getting Your Ducks In A Row

- Get support
  - Identify a committee member to champion the improvement effort and report data on a regular basis (implementation and sustainment)

- Be inclusive
  - Ensure the operational owner is on-board with your observations and is not caught off-guard in a public forum
  - Invite members of governance to participate in improvement teams, ask them to sponsor the effort
Aligning Through Data

- Facility Leadership View
  - Facility Trend Report
- Provider View
  - Daily Summary
- Patient View
  - Bed Board
- Unit Leader’s View
  - Discharge Log
- System Leadership View
  - Patient Mgmt Dashboard

Levels of Detail:
- Frequency of Reporting
Stay The Course

- Transformation will NOT occur as quick as you like – be vigilant
- Remember, others do not care as much as you do so do not be deterred when they take longer to be as invested as you
- Share one tool utilized in the improvement effort with the committee to expose them to application of problem solving theories
  - Do NOT overwhelm them with too many techniques
  - Try a new tool / technique with each presentation
The Facility Perspective
Standardized Work
Standardized Work Sustains

Indicators of Improvement

JM (Kaizen)

JI (Standardize)

JR
(No Blame, Mentoring, Understanding)

Holding Standard Work

Without Holding Standard Work

Time

SOURCE: Jim Huntzinger.
Standardized Work

- Standardized Work is a simple prescribed, **repeatable sequence** of operations that is the safest, highest quality, and most efficient way to perform a particular process, or task.
Visual Management
Visual Management: Awareness

Examples are all around us!
Visual Management: Spread

Staff will often create them in the absence of a system – how do we capture, vet, and spread?
TWI Job Instructions

How to teach people to quickly learn to do a job correctly, safely, and conscientiously.
Departmental educators tend to focus on the more clinical intensive education.

Nurse 1 teaches nurse 2, who teaches nurse 3, …

Lots of variation: nurse-to-nurse, shift-to-shift, day-to-day.
The Four-Step Learning Process

Step 1. Prepare the worker.

Step 2. Present the operation.
- Important Steps
- Important Steps + Key Points
- Important Steps + Key Points + Reasons

Step 3. Try out performance.
- Important Steps
- Important Steps + Key Points
- Important Steps + Key Points + Reasons

Step 4. Follow-up.
**JOB INSTRUCTION BREAKDOWN SHEET**

**Operation:** Patient Communication Using AIDET

<table>
<thead>
<tr>
<th>IMPORTANT STEPS</th>
<th>KEY POINTS</th>
<th>REASONS / EVIDENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>• A logical segment of the operation when something happens to advance the work.</td>
<td>• Anything in a step that might: 1. Make or break the job 2. Injure the worker 3. Make the work easier to do, i.e. &quot;knack&quot;, &quot;trick&quot;, special timing, bit of special information.</td>
<td>• Reasons for each key point.</td>
</tr>
<tr>
<td>• <strong>Acknowledge</strong></td>
<td>• Smile.  • Make eye contact.  • Use their name.  • Anticipate patient’s needs.</td>
<td>• Put them at ease.  • Build trust.  • Involve patient in their care.</td>
</tr>
<tr>
<td>• <strong>Introduce</strong></td>
<td>• State your name.  • State your role in the organization.  • Communicate your experience and skill set.  • Manage-up co-workers.</td>
<td>• Reduce anxiety.  • Build trust.  • Build trust.  • Build trust.</td>
</tr>
<tr>
<td>• <strong>Duration</strong></td>
<td>• Communicate wait time (over estimate time).  • Communicate check back time.</td>
<td>• Exceed expectations.  • Reduce anxiety by establishing expectations.</td>
</tr>
<tr>
<td>• <strong>Explanation</strong></td>
<td>• Explain steps in the process.  • Explain reason for wait.</td>
<td>• Involve patient in their care.  • Reduce anxiety.</td>
</tr>
<tr>
<td>• <strong>Thank You</strong></td>
<td>• Ask for questions/concerns.  • Thank patient for: their cooperation, their understanding, for choosing SSFHS (state facility name).</td>
<td>• Involve patient in their care.  • Build loyalty with our customers.</td>
</tr>
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3 Levels of Kaizen

Management-oriented Kaizen
- COG Group
- Best Practices
- New Indy Bed Tower
- EMR Implementation

Team-oriented Kaizen
- Six Sigma Projects
- Now ER
- Woman’s & Children’s 3P

Individual & Small Group-oriented Kaizen
- Lean Events
- Daily Kaizen

Bubble size is meant to roughly represent relative size of effort

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<table>
<thead>
<tr>
<th>Kaizen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>Name</td>
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</tbody>
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Steps of Kaizen

1. See & Find:
   - Find improvement ideas.

2. Discuss:
   - Discuss with a.) supervisor and b.) those affected.

3. Implement:
   - You do it (with help).

4. Document:
   - Write it down.

5. Share:
   - Post it and talk about it.
Metric Boards and Daily Operational & Quality Huddles
### Daily Metric Board

<table>
<thead>
<tr>
<th>Service</th>
<th>Safety</th>
<th>Quality</th>
<th>Finance</th>
<th>People</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call light response time</td>
<td>Hand-washing</td>
<td>ACMs</td>
<td>Hrs/pt days</td>
<td># call offs</td>
<td>TBD</td>
</tr>
</tbody>
</table>

#### Yesterday (1 wk)

#### Causes

#### Trends (1 yr)

#### Trends of Causes
Process Ownership
Lean Focus: 7 Wastes

Non-Value Added Activities

- Defects
- Overproduction
- Waiting
- Transportation
- Inventory
- Motion
- Excess Processing

1 Numbers based on healthcare industry averages and IHI white paper “Going Lean in Healthcare”
The Process Wastes: Ownership

- Making the concepts tangible for staff.
- Show lots of examples.
- Waste Identification Sheet (provided in your participant workbook).
- Waste Walk.
Creative Applications

Be creative in your implementation, and let your teams be creative!
Interested in learning more?

Join us for the full Value and Sustainment workshop in New Orleans!