Virginia Mason™

Daily Management

Julie Fry

October 2014

Today's Objectives

- (Minor) Understand how Daily Management fits in with VM organizational management framework
- (Major) Identify the 5 elements of Daily Management
- (Major) Understand how Daily Management principles can support your leaders and team members

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The Virginia Mason Production System

We adopted the Toyota Production System philosophies and practices and applied them to health care because health care was so lacking in an effective management approach that would produce:

- **Customer first**
- **Highest quality**
- **Obsession with safety**
- **Highest staff engagement**
- **A successful economic enterprise**

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Traditional Health Care Management System?

© DC Comics

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World-Class Management

The World-Class Management System is a leadership system that provides focus, direction, alignment, and a method of management for daily work

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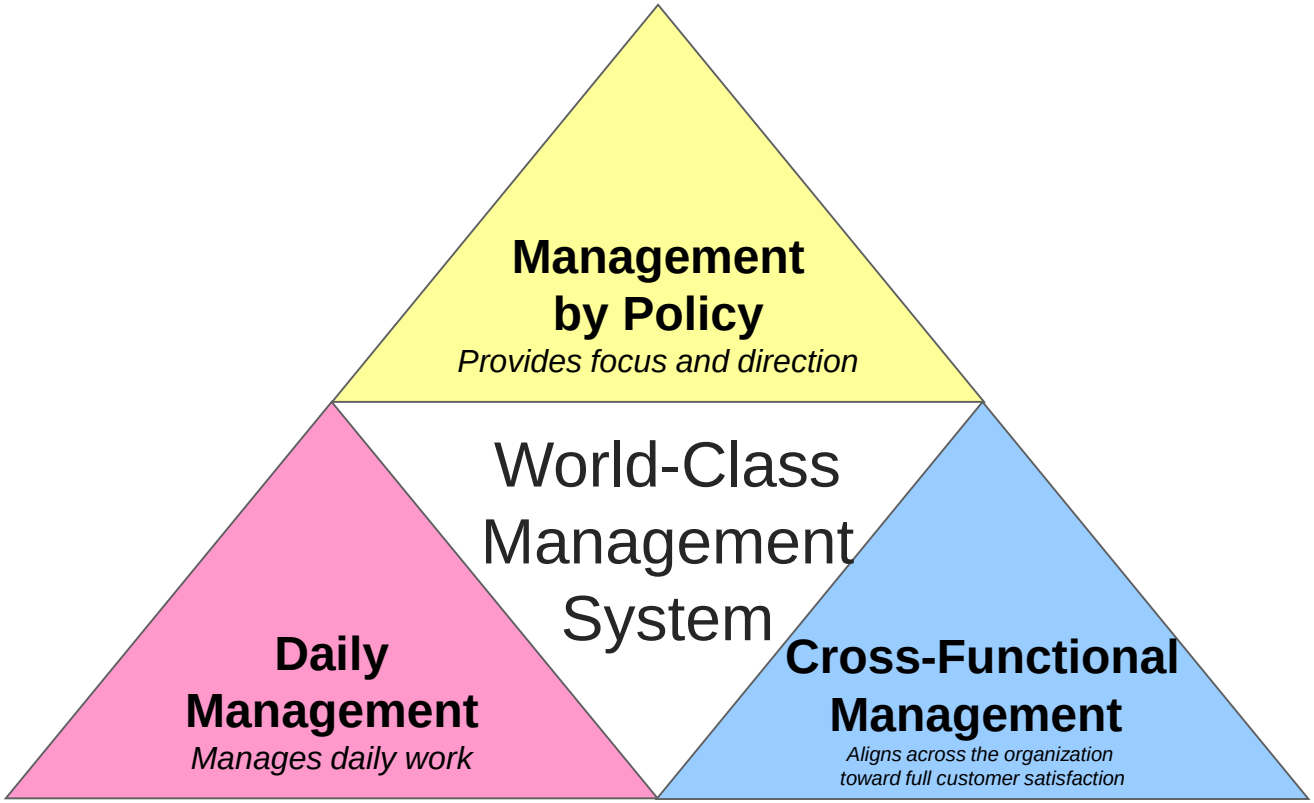
TEAM MEDICINE VIRGINIA MASON

World-Class Management

The World-Class Management System is a leadership system that provides focus, direction, alignment, and a method of management for daily work



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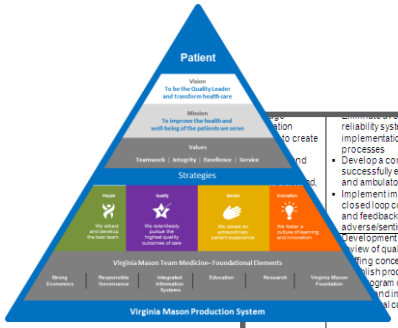
Management by Policy
Aligning Vision with Resources

Long Term Vision



5 year Plans

Annual Goals

Quality and Safety
Prevention, Early Identification, and Treatment:
- Early Identification and Treatment of Severe Sepsis
- Eliminate Healthcare Associated Infections
- Glycemic Control
- Prevention Hospital Associated Delirium

Designing the Quality Care Continuum:
- Patient-Centered Coordinated Care
- Smoothing Patient Flow

Service: Patient Experience
- Integration of the Patient Experience

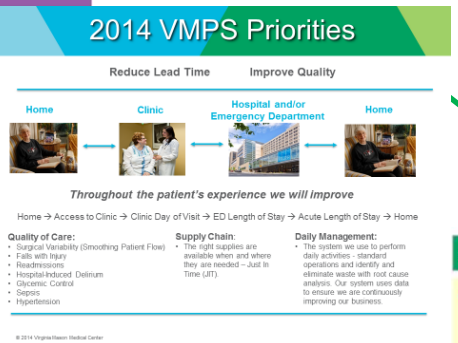
People: Team Engagement
- Strategic Staffing Initiative
- Transformational Leadership

Strong Economics
- Strong Economics

Integrated Information
Leveraging our Data:
- Measure and Improve our Results

Realizing the Potential of our EHR:
- Enhancing Online Services

KPO Priorities



Clinic Priorities

Section Priorities

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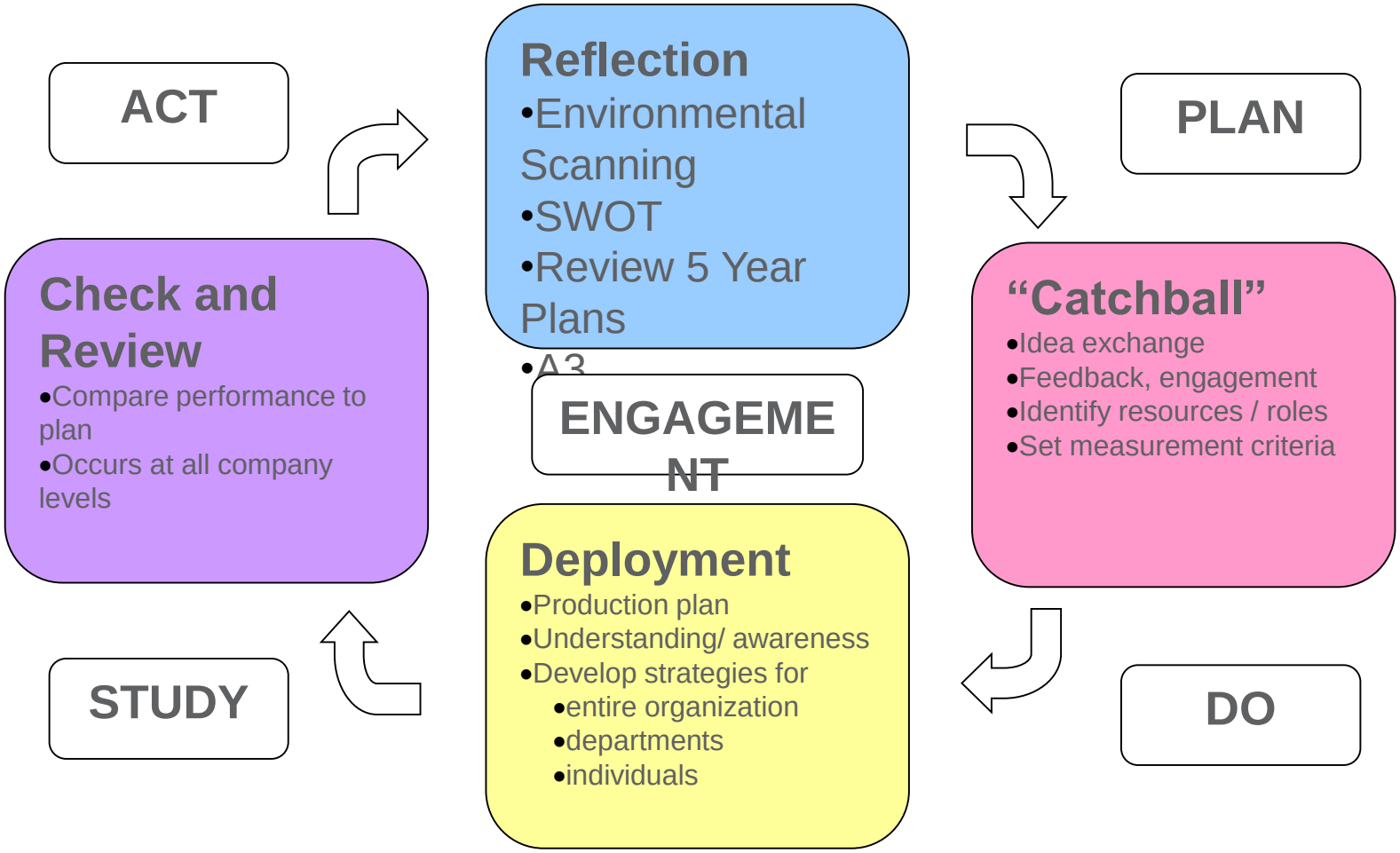
Management By Policy, or Hoshin Kanri



Adapted from elements of World Class Management, Management by Policy

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Check and Review Cycle

- regular checks and reviews are critical
- determines current status of goal achievement
- conducted regularly (e.g., daily, monthly, quarterly)
- includes intensive, objective study of data
- joint problem-solving, planning, and follow-up may be required

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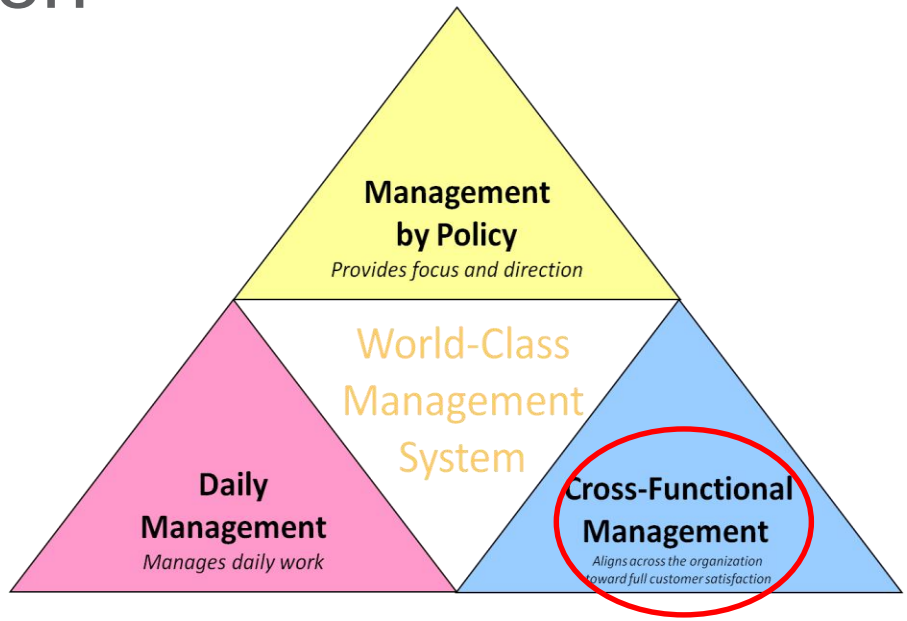
Cross-Functional Management

A management system for implementing breakthrough improvements that is always focused on the elements of full customer satisfaction



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Cross-Functional Management

- Achieving full customer satisfaction requires integrated cross-functional management, teams working together, not at cross purposes
- Top leadership must integrate the organization into a close-working system
- All functions must work together to achieve optimum quality, delivery, cost and service (QDCS)
- “The ‘horizontal weave’ must be stronger than the ‘vertical weave’” Kaoru Ishikawa

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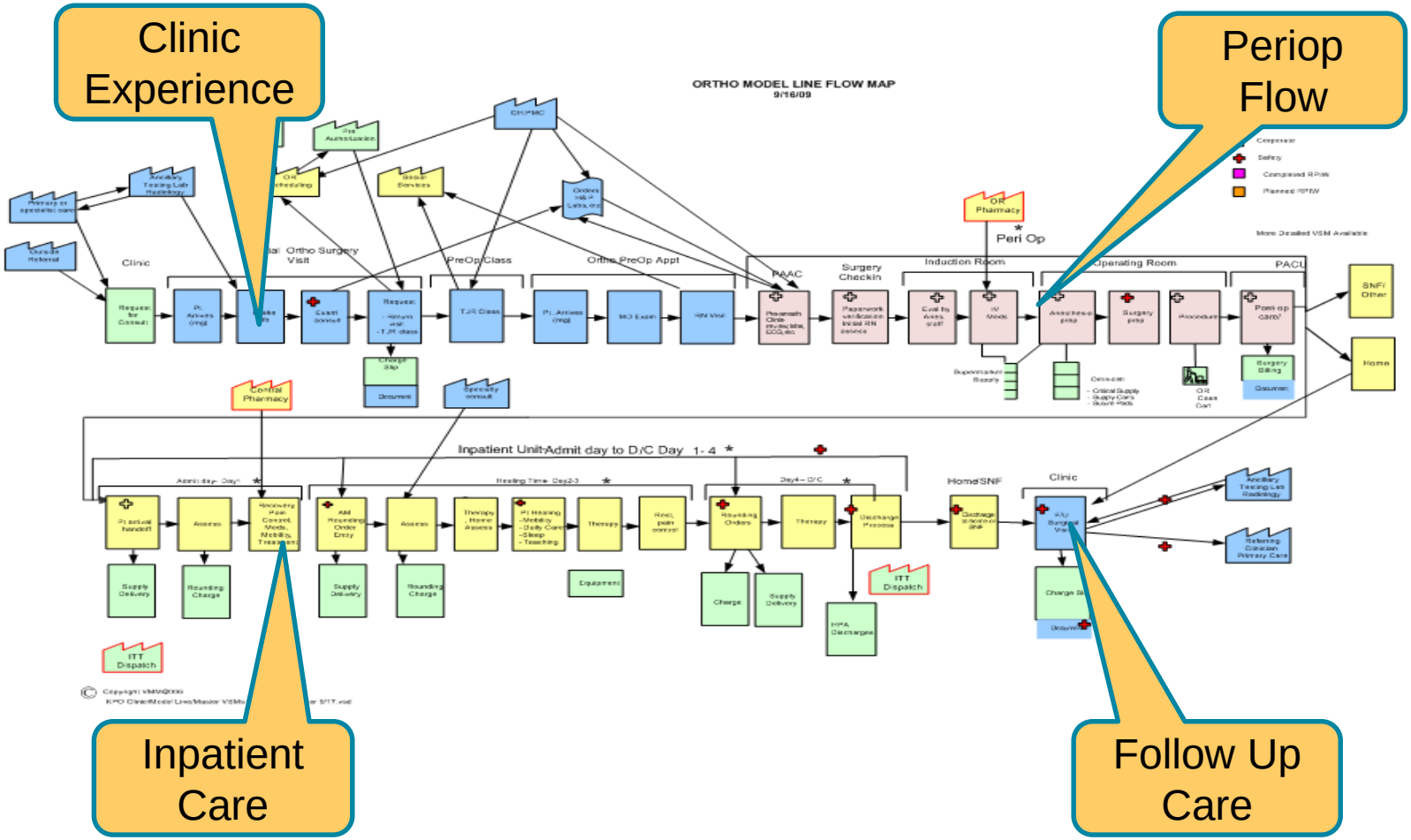
Cross Functional Management

Orthopedic Value Stream



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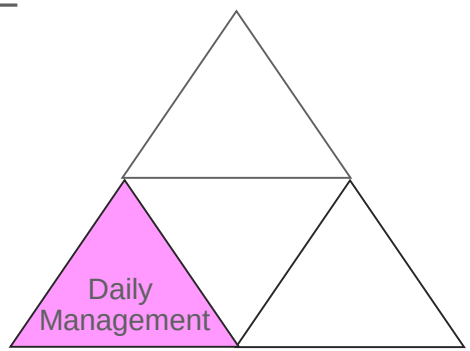
Daily Management

Daily Management

Repetitive daily activities and behaviors that leaders engage in to ensure customer demand is met and identify abnormal conditions:



- Know at a glance status of daily work
- Completing planned work
- Understand status of upstream and downstream processes
- Standard work being followed
- Know when to take action and what action to take
- Engaging Staff

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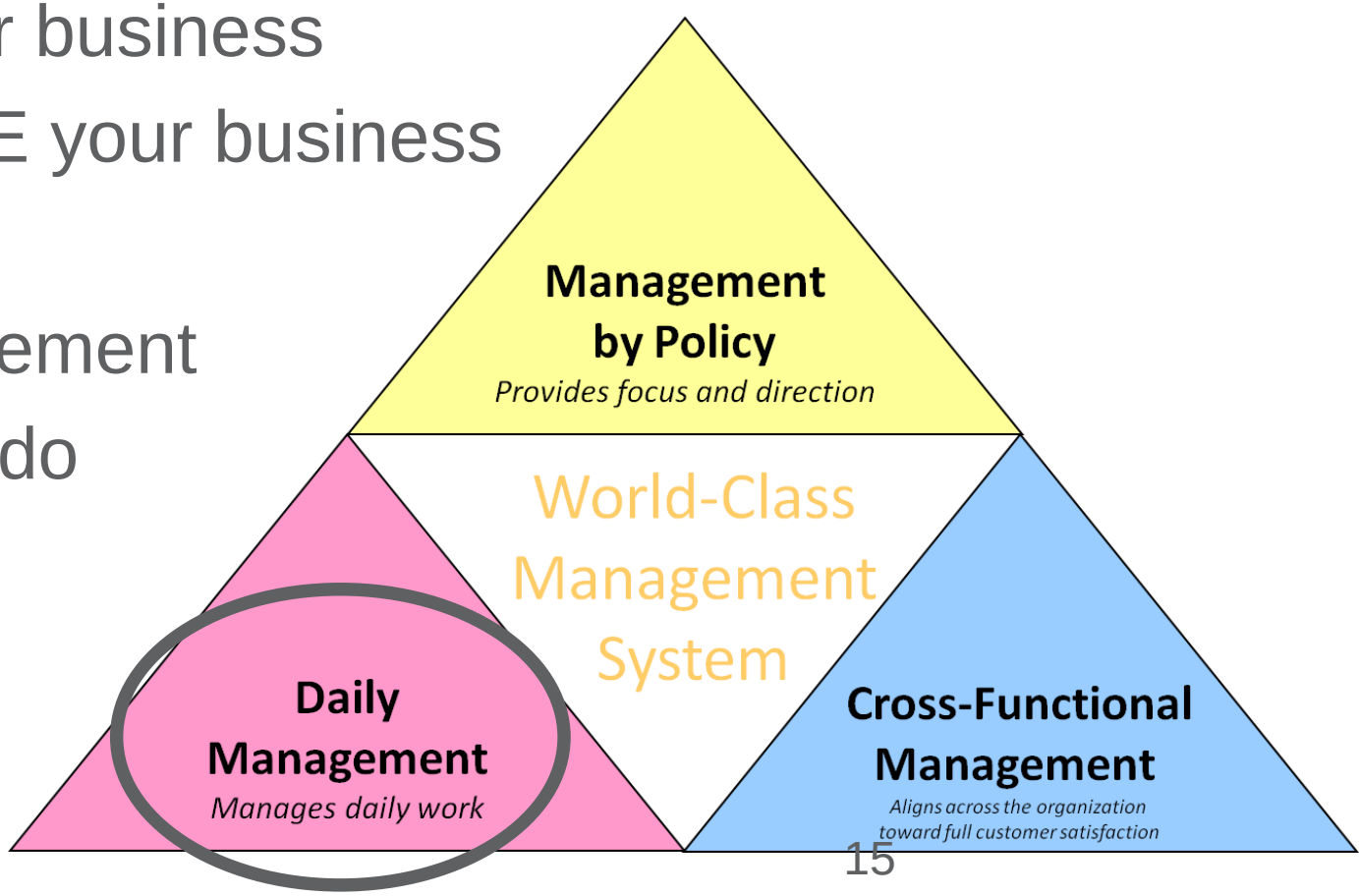
The Leader's Primary Mission

As a leader you have 2 jobs:

1. RUN your business
2. IMPROVE your business

Daily management is HOW you do this…



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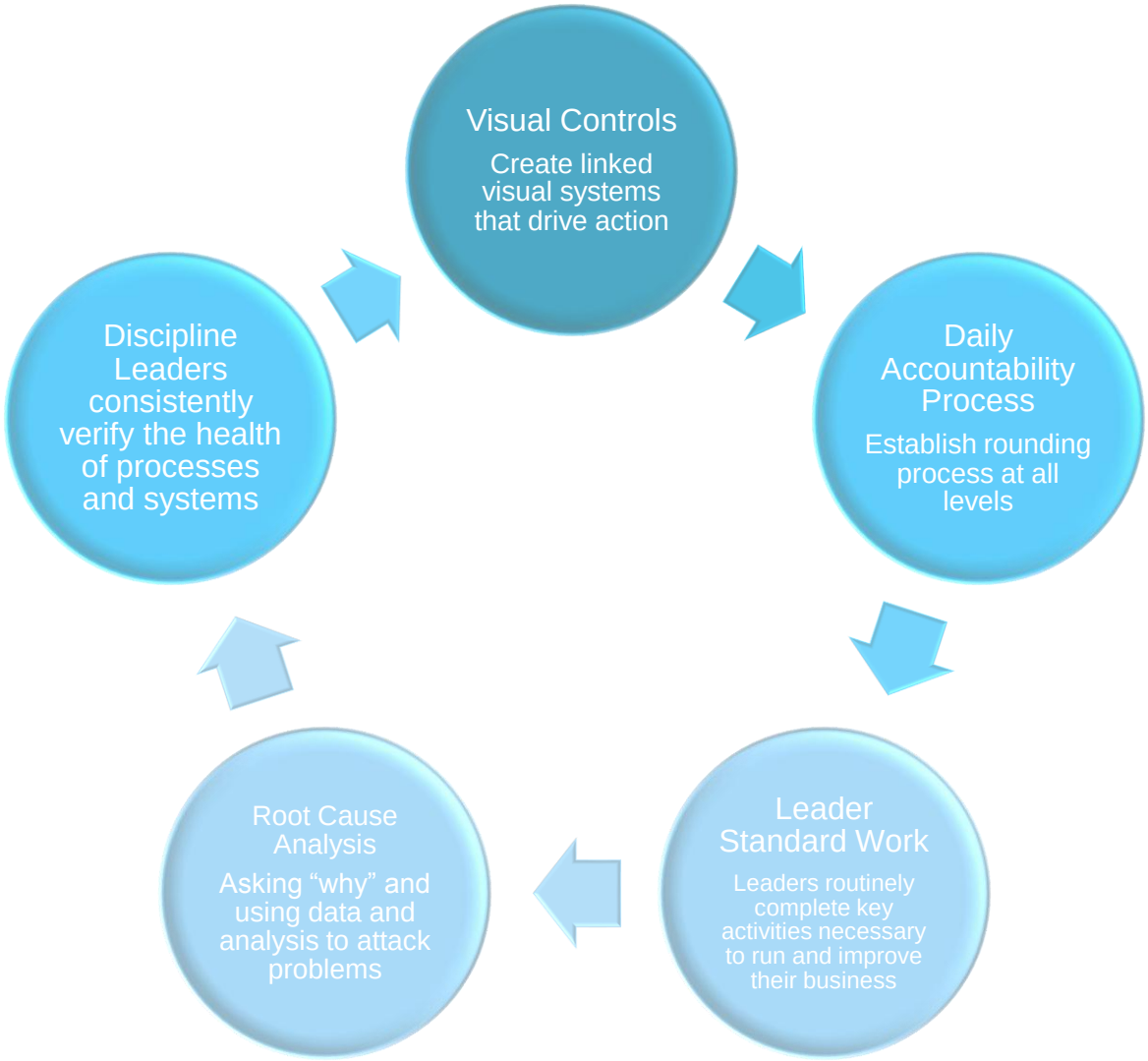
The FIVE Principle Elements of Daily Management



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Demand

In order to run your business, you have to KNOW your business.

Start with understanding your demand

- A metric that reflects your departmental objective – one that tells you whether you're meeting your day-to-day customer requirements.

  (e.g., 22 patients per day per MD, or Ortho surgery schedule = 5 total hips on Tue, L9 requires 5 empty beds. etc)

- A metric that reflects the health of your departmental processes.

  (e.g. 48 hour post discharge phone call for all medical patients)

NOTE: Be sure you are looking at process measures versus outcome measures (e.g. how is your staff currently handling the demand of phone calls versus what do the phone stats show on the analytics report retrospectively?)

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Supply

Now that you have identified your demand, what is your supply (what resources do you need to meet demand)?

Hospital example:

- Daily staffing and types of staffing needs (RNs, PCTs, MAs, MDs, RTs, etc)
- Room availability?
- Special equipment?

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Visual Control

Production Boards

Understand your business

- Key business function to meet customer demand
- Daily/weekly demand (plan). (Pts., files, checks, etc.)
- Capacity (FTEs, rooms, machines)

Make it visual

- Determine best metric-should be process not outcome
- Frequency to measure (daily, weekly)
- Visual display of plan versus actual
- Communicates key expectations with simple visual displays

Make it easy (at a glance)

- Standards are clear (quantifiable activity)
- Abnormal conditions are visible
- Improvement opportunities are apparent

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Visual Control Starting Point

Genba Production Board Checklist	✓
Capacity	
Daily Assignments (lunch/breaks, assignments)	
Demand	
Evidence of Visual Review by Leader	
Leadership on Point for the Day	
Normal/Abnormal Status	

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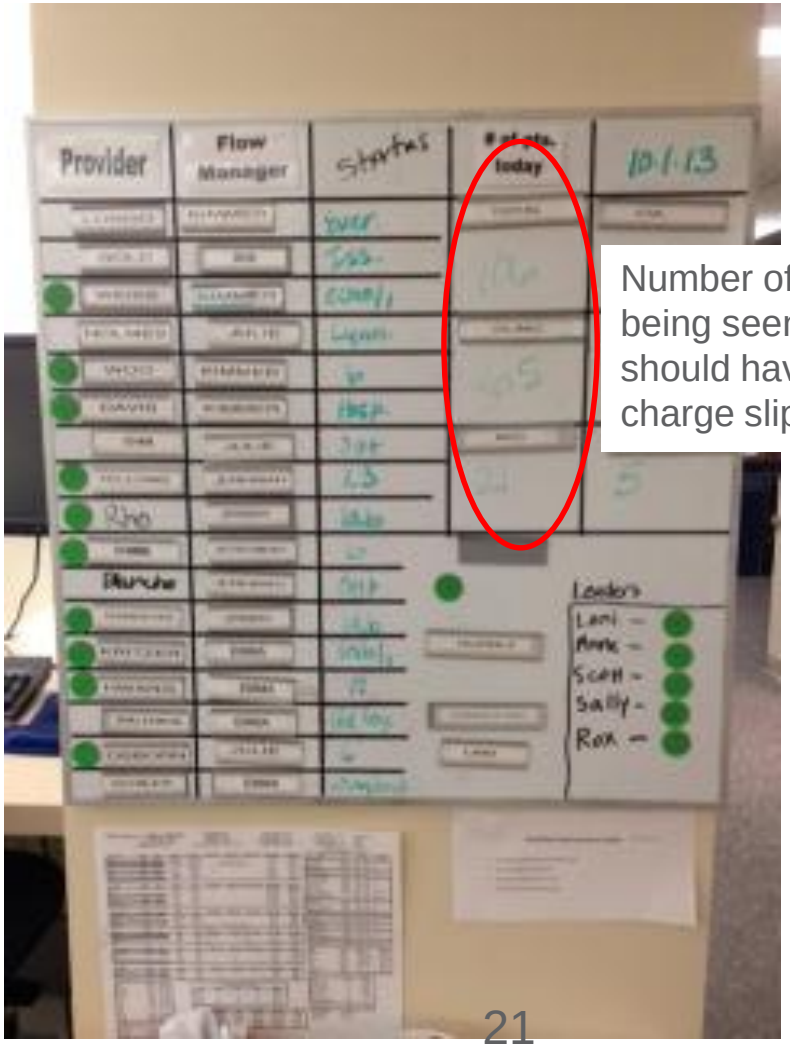
Visual Control

Production Boards

- Cardiology
- CTS



Number of patients being seen today, should have this many charge slips

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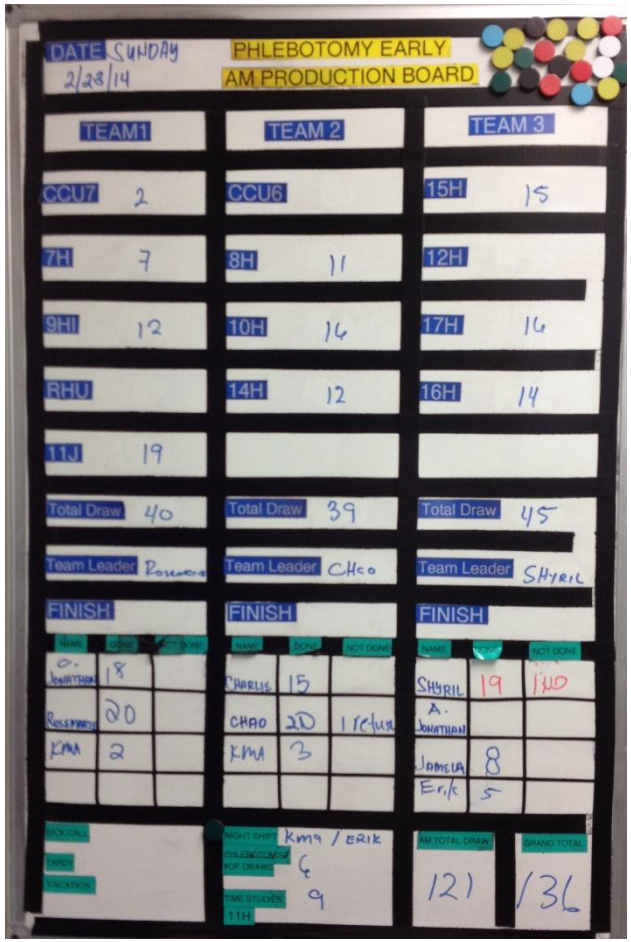
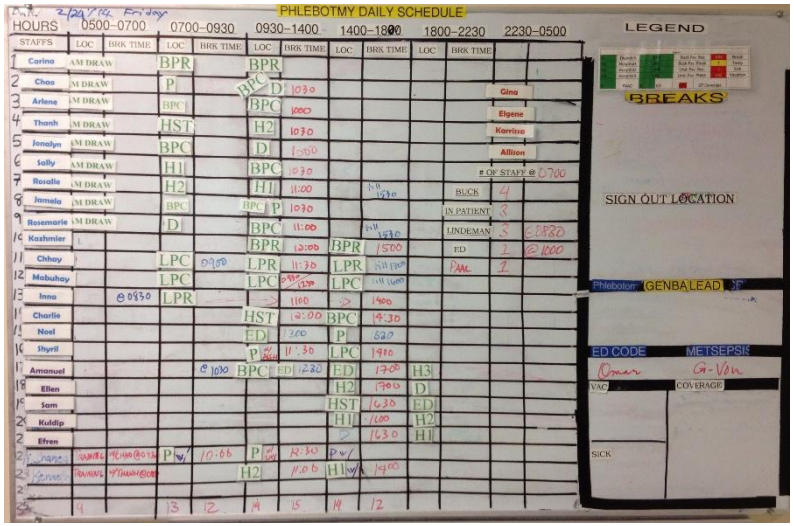
Phlebotomy



AM Draw Production Board – team assignments and team leaders

Daily schedule



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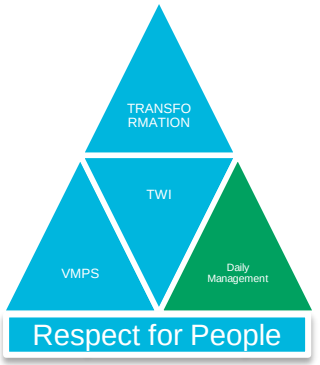
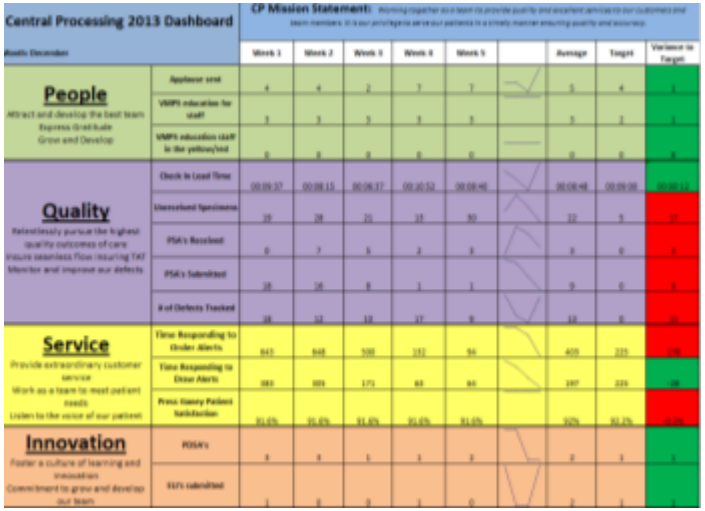
Daily Management

Production

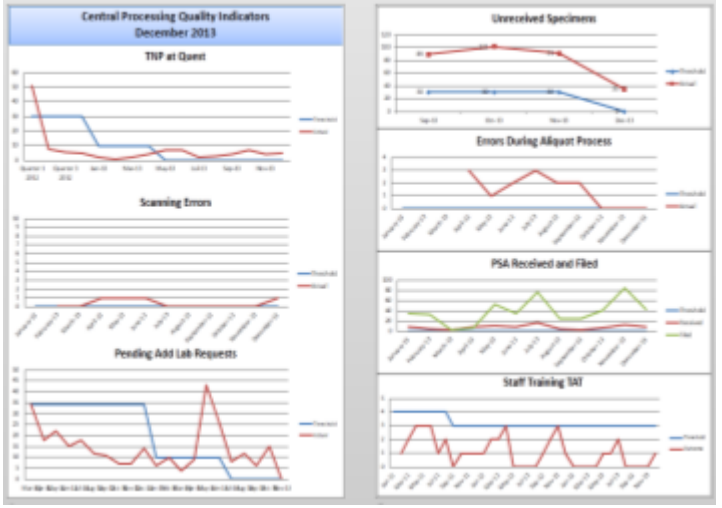


Daily

Weekly



Monthly



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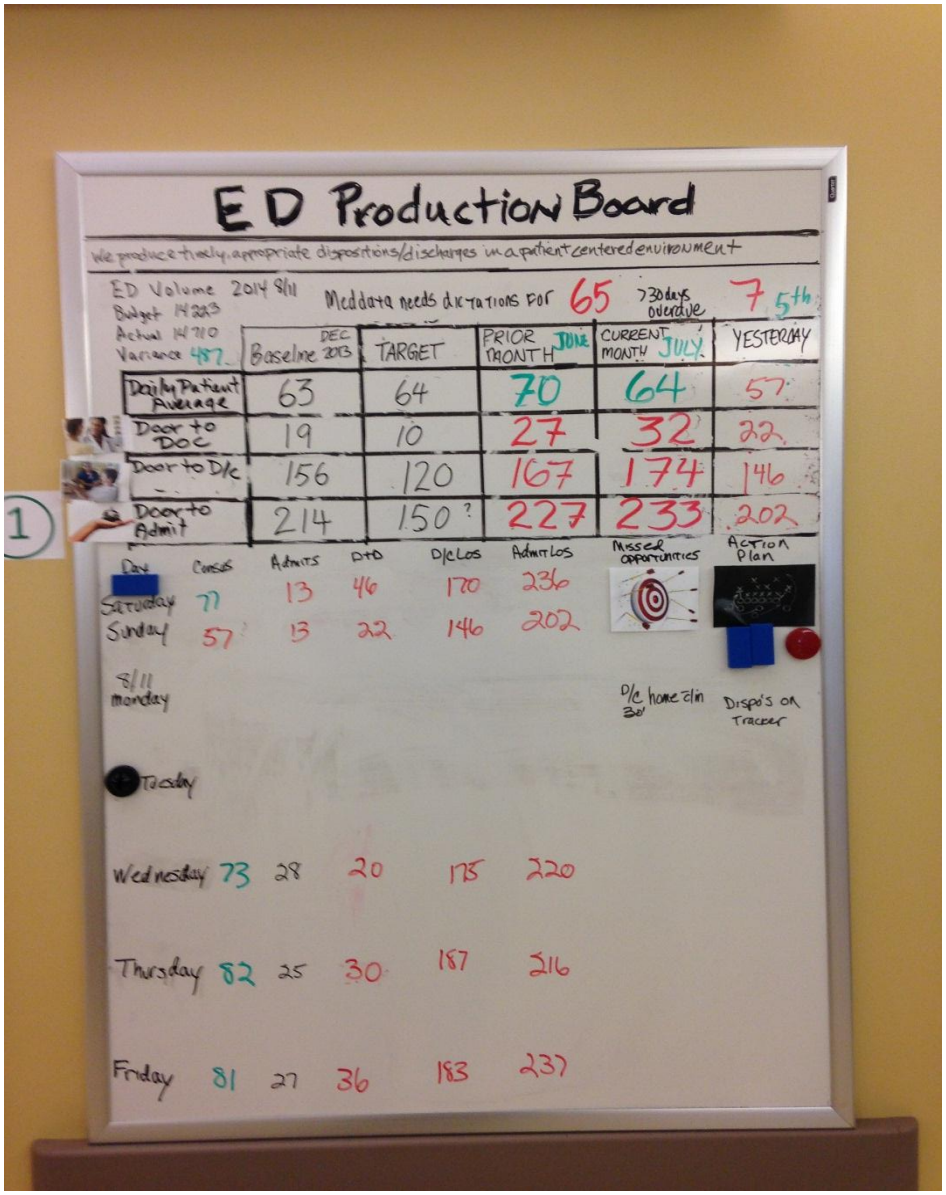
Quick and Dirty



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Visual Controls

Patients can see status

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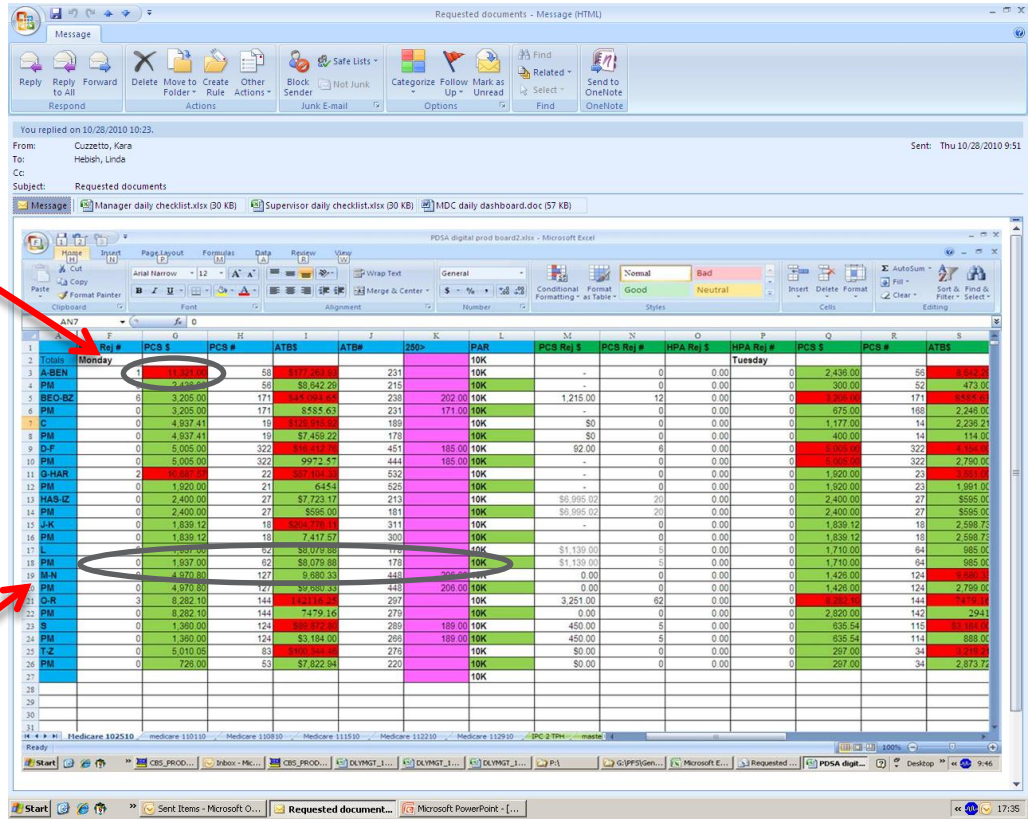
Visual Controls

Here's an example of how insurance payment closure understands their business daily

Visual signal for help

Staff member can see & re-assign to help



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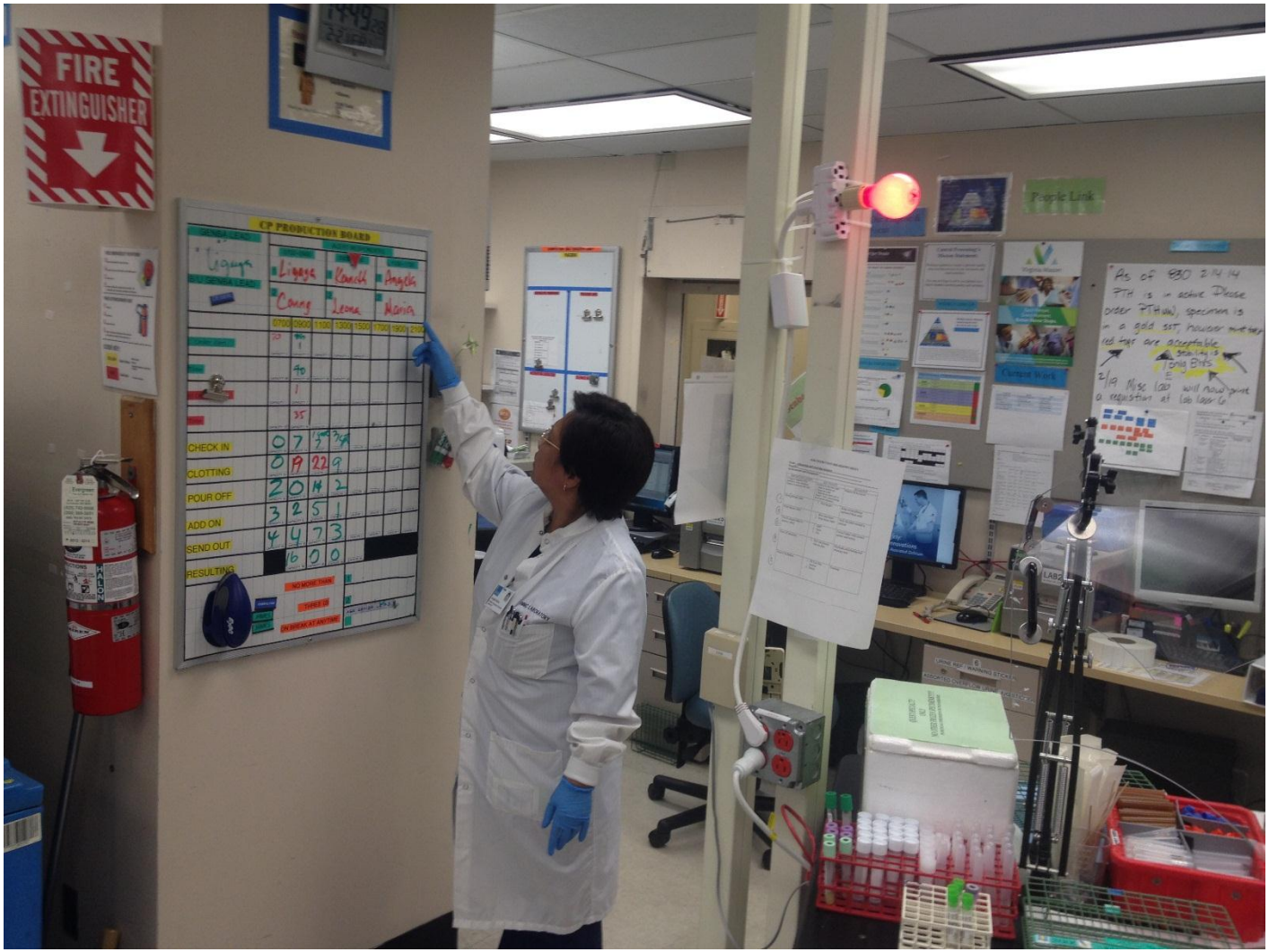
Responding to abnormalities



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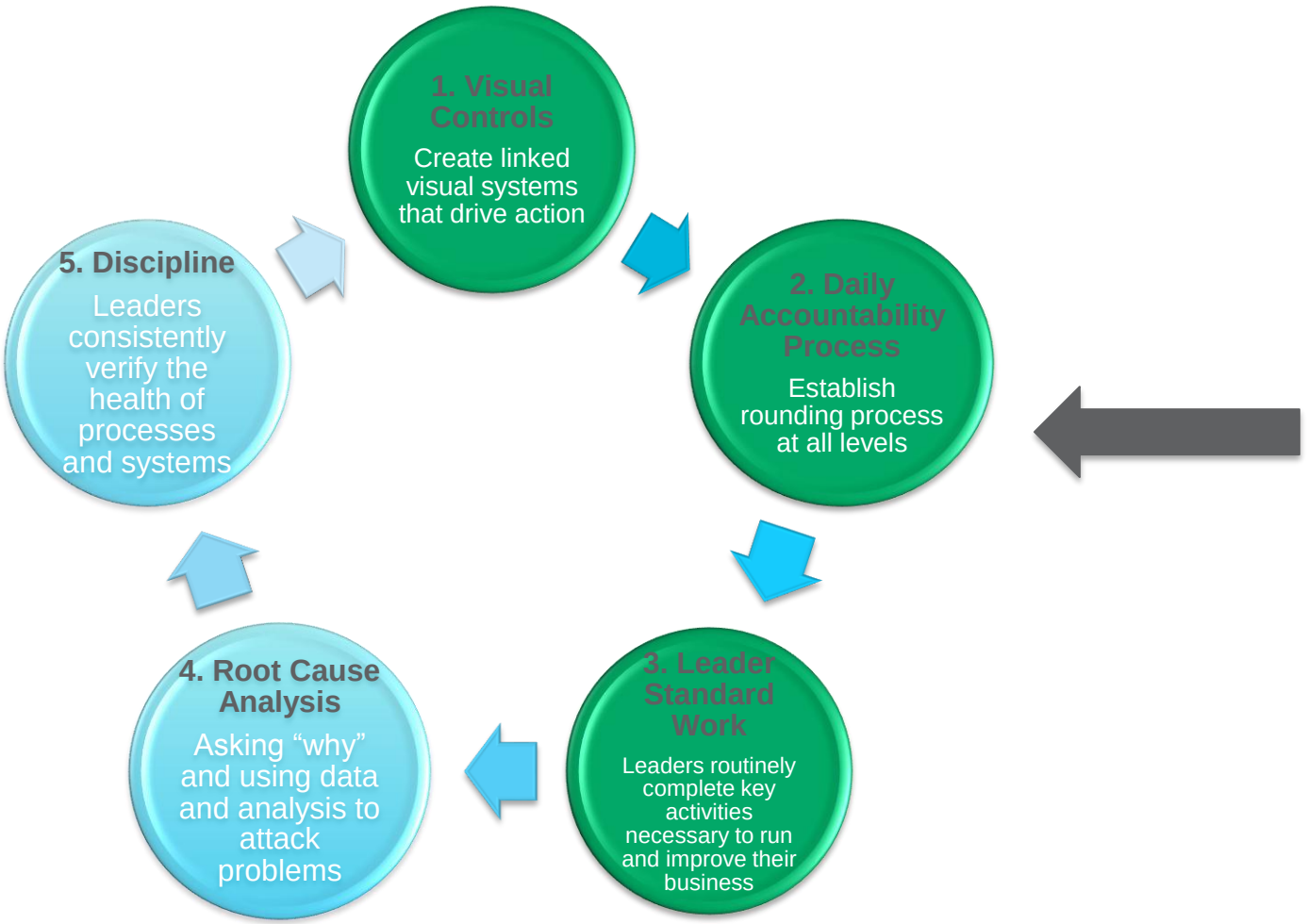
Daily Accountability



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Daily Accountability Concepts

Huddles

- “Go see. Ask why. Show respect.” (Mr. Cho, Chairman TMC)
- Regular checks on the production boards
- Process to follow up on the stories told by the visual controls
- Leaders hold people accountable for completing their assigned tasks

Genba Rounds

Visibility of all levels of leadership involvement

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Huddle

Huddles with Standard Agenda

- *Demand*: expected vs. current
- *Capacity*: availability of staff, beds, appointments, etc.
- Identify and trend *abnormalities*/assign improvement work as needed
- Develop plan to address any variances
- *Performance* from the previous day to be recognized or addressed/improved (e.g., quality measure such as phone stats, outstanding WIP, etc.)

Agenda

*Staffing
*Demand
*Capacity
*Yesterday's Performance
*New Issues

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Team Huddle

Daily Accountability Process

Build the foundation with genba walks and a routine for huddles.

- Team leader huddle with team at start of shift at a minimum once per day

RUN my business:

- Standard agenda/checklist
- Staffing and rotation
- Updates regarding performance from the previous day
- Takes place at the production board
- Review today's plan – note issues
- No longer than 15 minutes; standing up

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Genba Round

- Team leader huddle with team
- Supervisor huddle on genba with team leaders (daily)

RUN my business:

- Review production boards
- Safety, Service, Quality, Cost

IMPROVE my business:

- Review issues from previous day – trend abnormalities
- Task assignment (red dot, green dot)
  - From the trending of production issues, visual board depicts who is assigned, due date, and on task (green) or off (red).

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Genba Round

- Team leader huddle with team
- Supervisor huddle on genba with team leaders (daily)
- Supervisor huddle on genba with manager (weekly)

Leadership

Review issues, trends, abnormalities
Conducts Root Cause Analysis
Create/review action plans

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Genba Round

- Team leader huddle with team
- Supervisor huddle on genba with team leaders (daily)
- Supervisor huddle on genba with manager (weekly)
- Manager genba walk with directors/executives (monthly/quarterly)

RUN/IMPROVE my business:

- Starts at production board
- Review issues, abnormalities, trends
- Opportunity to discuss and make a plan for issues that cannot be solved locally.

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Daily Huddle Barriers

Barriers to daily huddles include:

- 24/7 operation
- Phone work (can't remove everyone at same time)
- Staggered start times
- Staff work from home

Some ideas our staff have leveraged:

- Videotape
- Sharing of huddle leadership
- Cascading huddles

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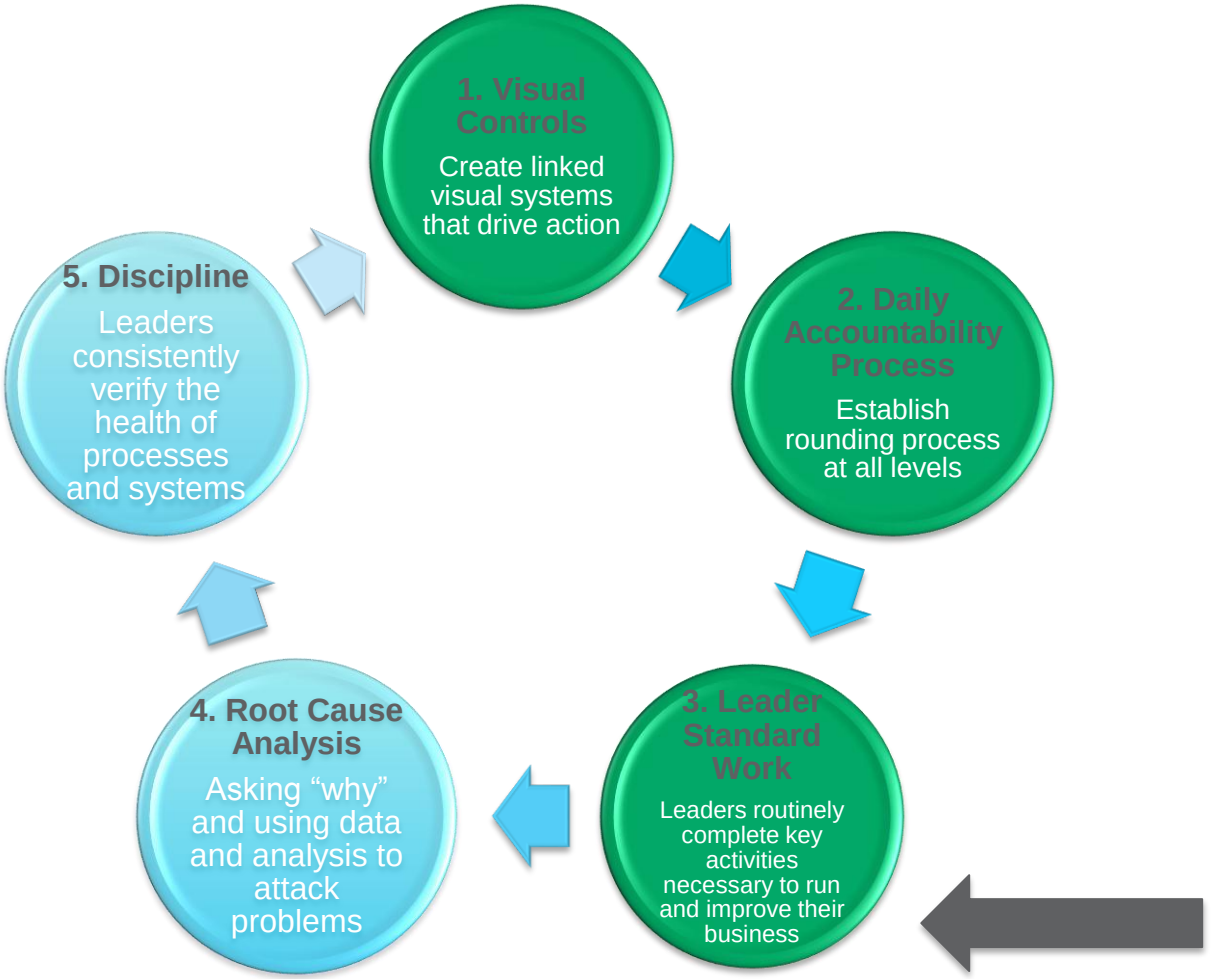
Leader Standard Work



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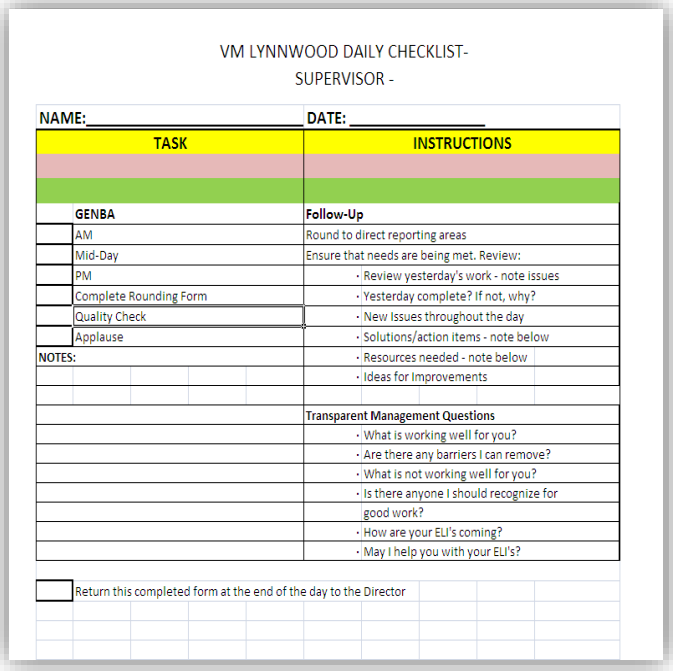
Standard Work for Leaders

Standard work for leaders specifies the actions to be taken each day to focus on the processes in each leader's area of responsibility.

Clinic Supervisor Daily List



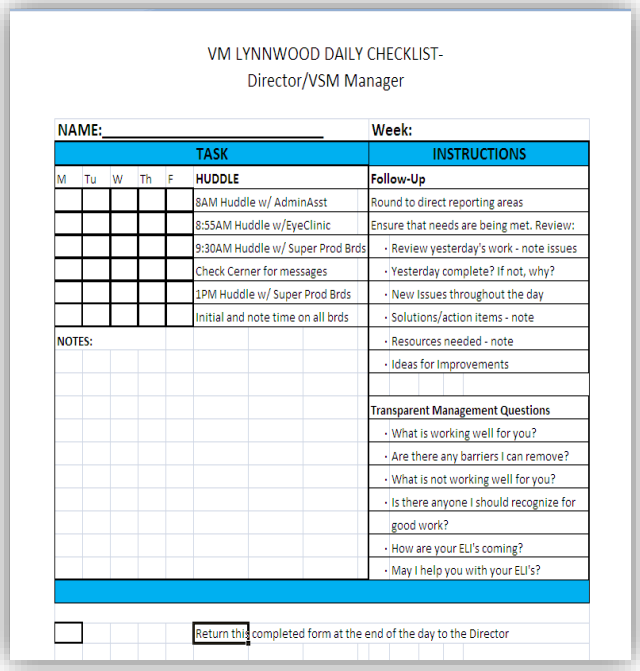
VM LYNNWOOD DAILY CHECKLIST-
SUPERVISOR -

NAME:_____ DATE: _____

	TASK	INSTRUCTIONS
	GENBA	**Follow-Up**
	AM	Round to direct reporting areas
	Mid-Day	Ensure that needs are being met. Review:
	PM	· Review yesterday's work - note issues
	Complete Rounding Form	· Yesterday complete? If not, why?
	Quality Check	· New Issues throughout the day
	Applause	· Solutions/action items - note below
NOTES:		· Resources needed - note below
		· Ideas for Improvements
		Transparent Management Questions
		· What is working well for you?
		· Are there any barriers I can remove?
		· What is not working well for you?
		· Is there anyone I should recognize for good work?
		· How are your ELI's coming?
		· May I help you with your ELI's?

Return this completed form at the end of the day to the Director

Director Daily List



VM LYNNWOOD DAILY CHECKLIST-
Director/VSM Manager

NAME:_____ Week:

TASK						INSTRUCTIONS
M	Tu	W	Th	F	**HUDDLE**	**Follow-Up**
					8AM Huddle w/ AdminAsst	Round to direct reporting areas
					8:55AM Huddle w/EyeClinic	Ensure that needs are being met. Review:
					9:30AM Huddle w/ Super Prod Brds	· Review yesterday's work - note issues
					Check Cerner for messages	· Yesterday complete? If not, why?
					1PM Huddle w/ Super Prod Brds	· New Issues throughout the day
					Initial and note time on all brds	· Solutions/action items - note
NOTES:						· Resources needed - note
						· Ideas for Improvements
						Transparent Management Questions
						· What is working well for you?
						· Are there any barriers I can remove?
						· What is not working well for you?
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Critical Elements

Essential Assigned Work for Each Site Leader

	Frequency		
	Daily	Weekly	Monthly
Review Financials & Report Variances (information/report specific)	x		
Document & Follow Up on Issues/Concerns	x		
Document & Follow Up on Patient Alerts & Defects	x		
Review and Updated Kaizen Plan	x		
Operational Rounding (Leader rounding, Service rounding, etc.)	x		
Conduct Purposeful Genba Observations supported by VMPS tools		x	
Applause Recognition		x	
Sweep Staff Readiness: Performance Evals, FFD, etc.		x	
Review Press Ganey			x

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Critical Elements

Essential Assigned Work for one leader at each site

Leader Standard Work Checklist	Frequency		
Essential "Assigned" standard work for at least one Leader	Daily	Weekly	Monthly
Conduct Daily Huddle with Standard Work	x		
Review & Sign Genba Production Board (throughout the day)	x		
Sweep Work Environment/Facility	x		
Sweep for WIP (electronic systems for urgent messages i.e., Outlook, Cerner, etc.)	x		
Review Kronos (Overtime, no breaks, etc.)	x		
Plan & Schedule Staffing	x		
Perform Required Safety Audits & Checks	x		
Review VMPS for Leader Status		x	
Track & Trend Production Board Defects/Issues		x	
Update PeopleLink		x	

Suggestions for Leader

1. Keep standard work with you all the time
    - Clipboard, card, daily planner
    - Sequence of tasks
    - Visual
2. Note completion of tasks
    - Note if not completed in sequence
    - Checklist
3. Record daily notes
    - Review for opportunities at standard times
    - Update standard work for leaders tool after solutions implemented or kaizen

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Examples

VM Sand Point Leadership DAILY CHECKLIST

Week of:_____

TASK	Mon				Tue				Wed				Thur				Fri			
Update daily huddle board																				
ESM Schedule review																				
Facility check																				
Child Profile audits																				
General Cerner in-box msg's																				
	8:30	11:30	2:00	4:00	8:30	11:30	2:00	4:00	8:30	11:30	2:00	4:00	8:30	11:30	2:00	4:00	8:30	11:30	2:00	4:00
RN check																				
Front desk check																				
HIS check																				
RNFM check																				
Float MA check																				
MA: Provider team check																				
Rad check																				
PFS check																				

Issue	Improvement Idea	Assign

Kept on clipboard for both leaders to use (Weekly)

GIM Manager Daily Checklist

Date: _____

I. Meeting Management		View Weekly Calendar
		Print Daily Schedule
		Print Materials Needed For Meeting
		Notify Facilitator If Unable To Attend
II. Leadership Huddle		Items To Bring Up
		Info To Bring Back To Team:
		1
		2
		3
		4
III. Gemba Rounding		Review Flow Boards On Teams
		Team Assignments
		Check In With Phones/Front Desk
		Check In With Back Office
		Check In With Providers/Locums
		AM Rounding
		PM Rounding
		Complete Form
		Issues/Concerns:
		1
		2
		3
		4
		5
		6
Applause		1
		2
		3
		4
		5
NOTES		

Keeps these on a clipboard for rounding (Daily)

Manager IPC

DATE: _____

	TASK	Notes
	HUDDLE @ 7:45 am	Items to be included in Kara's Korner:
	Kara's Korner Items	
	7:45 AM Huddle @ Issues Board	
	Review Electronic Production Board	
	Review HPA managmet tool for any issues	
	Review Issues Board for items in ORANGE	
	Meeting Management	TO DO:
	Print Daily calendar and documents	Print and documents needed for meetings
	Print weekly calendar	
	Weekly Line up Questions:	
	Notes:	
	GENBA	Notes:
	AM	
	Mid-Day	
	PM	
	Complete Rounding Form	
	Quality Check- (Did they fill out EPB?)	
	Notes:	Transparent Management Questions
		· What keeps you here at VM?
		· What is working well for you?
		· Are there any barriers I can remove?
	Applause:	· What is not working well for you?
		· Is there anyone I should recognize for good work?
		· How are your ELI's coming?
		· May I help you with your ELI's?

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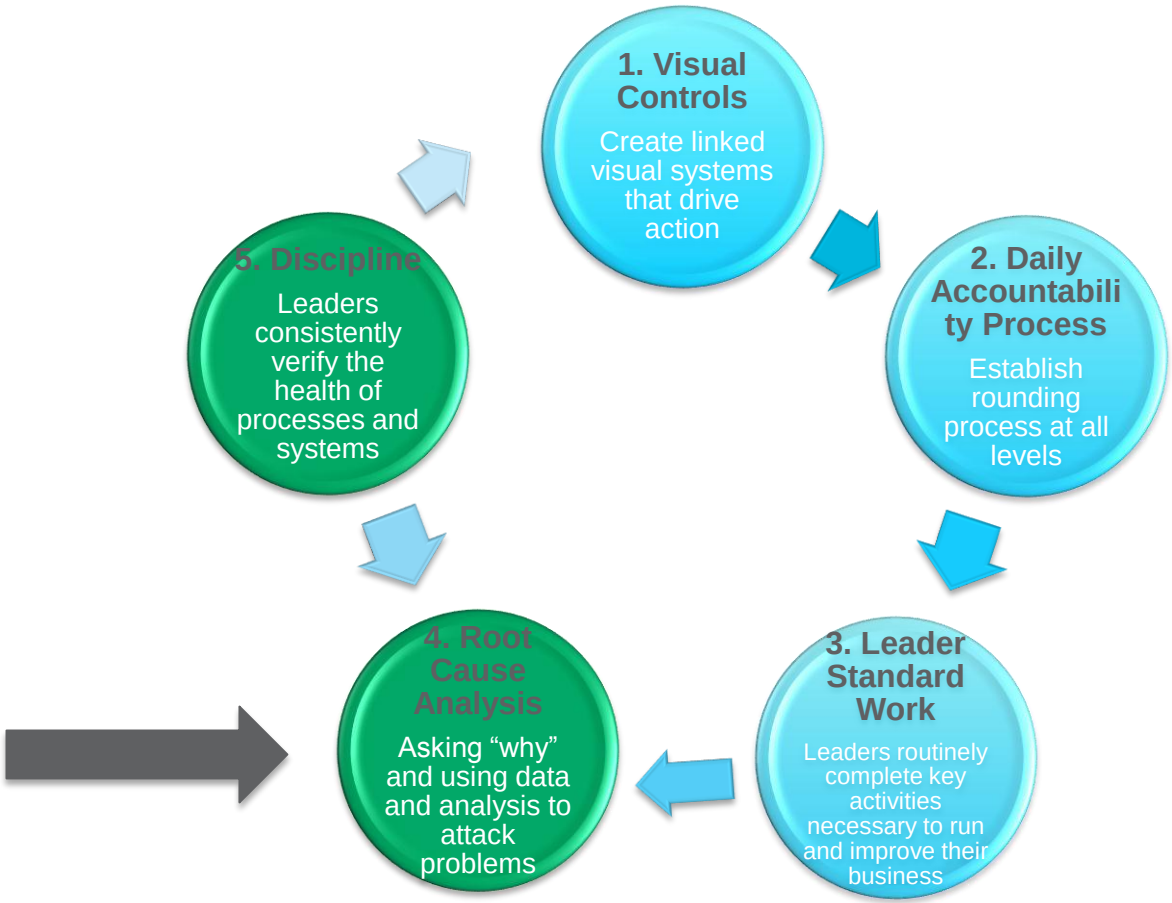
“

“The purpose of a lean system is to make problems glaringly obvious.”

Robert W. Hall, Editor in Chief
Target, Association for Manufacturing Excellence

Root Cause Analysis



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Improve Your Business

Root cause

- "The basic source from which a problem grows" David Mann, *Creating a Lean Culture*

Analysis

- A structured process of breaking a topic into smaller parts to gain a better understanding

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Steps from Identification to Solution

1) Identify and define the problem.
2) Quarantine the problem and take immediate REMEDIAL actions.
3) Involve the appropriate, knowledgeable people.
4) Conduct RCA (Root Cause Analysis).
5) Identify root cause solutions, assess them and test preferred alternative.
6) Implement root cause solution(s).
7) Monitor and revise the solution(s) as indicated by performance data.

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Step 1: Identify and define the problem

Your production board, daily rounding and tracking, value stream map, defect metrics, etc., will show you where to start.

This is knowing your business.

This can be MUCH harder than it sounds…

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Step 2: Quarantine the problem and take immediate remedial actions

This allows the workers to stop the line, identify the issue and correct immediate defects

A structured process solves the problem and changes the culture from creating a work around

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Step 3: Involve the appropriate, knowledgeable people

- Upstream
- Midstream
- Downstream
- Sidestream
- This list may expand and contract as you get to real root cause.

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Step 4: Conduct Root Cause Analysis

RCA is more than fixing the current problem, it's about preventing it from occurring again

- 5 Whys
- Affinity Diagrams
- Fishbone Diagrams

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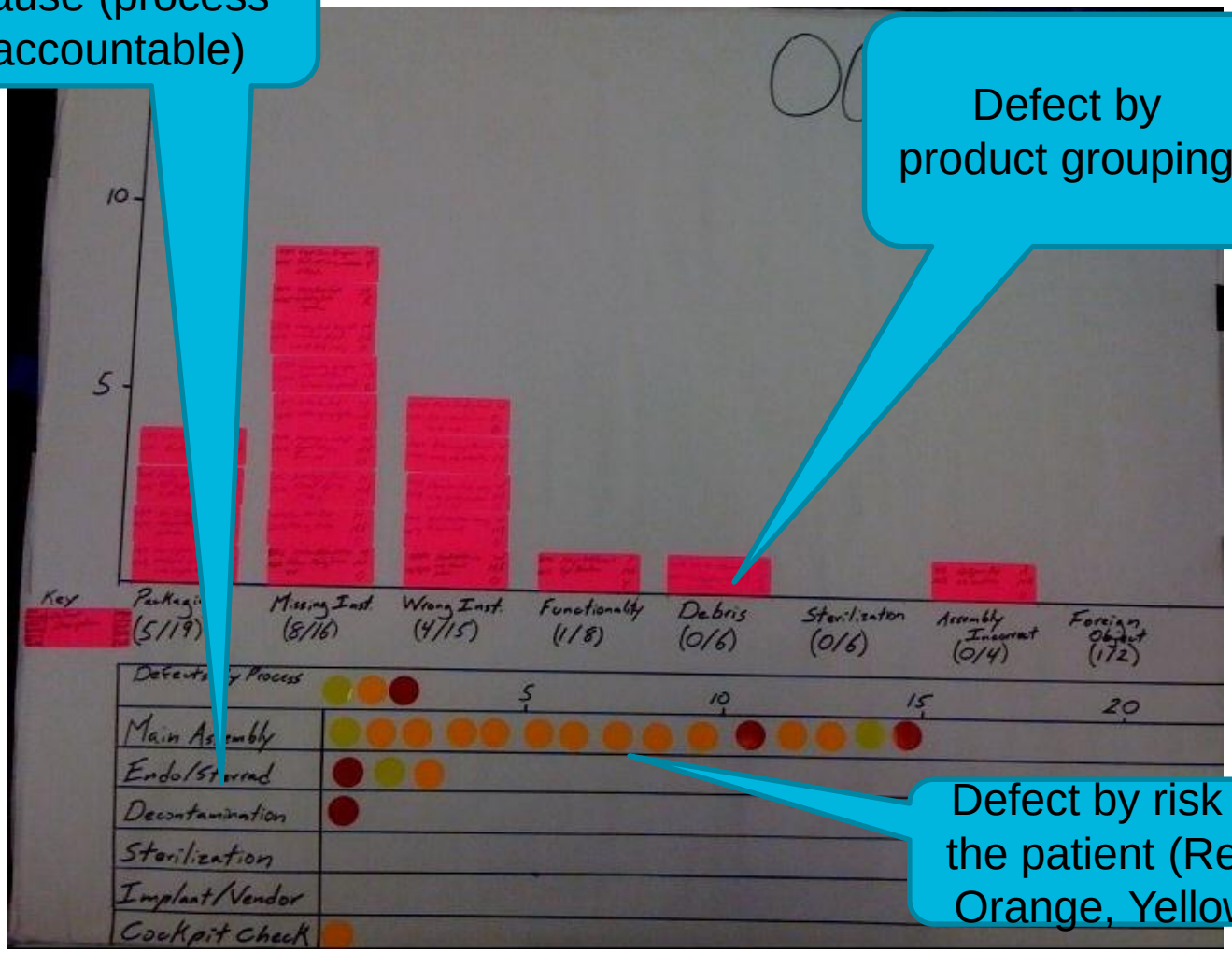
Root Cause: Looking at Data 3 Ways



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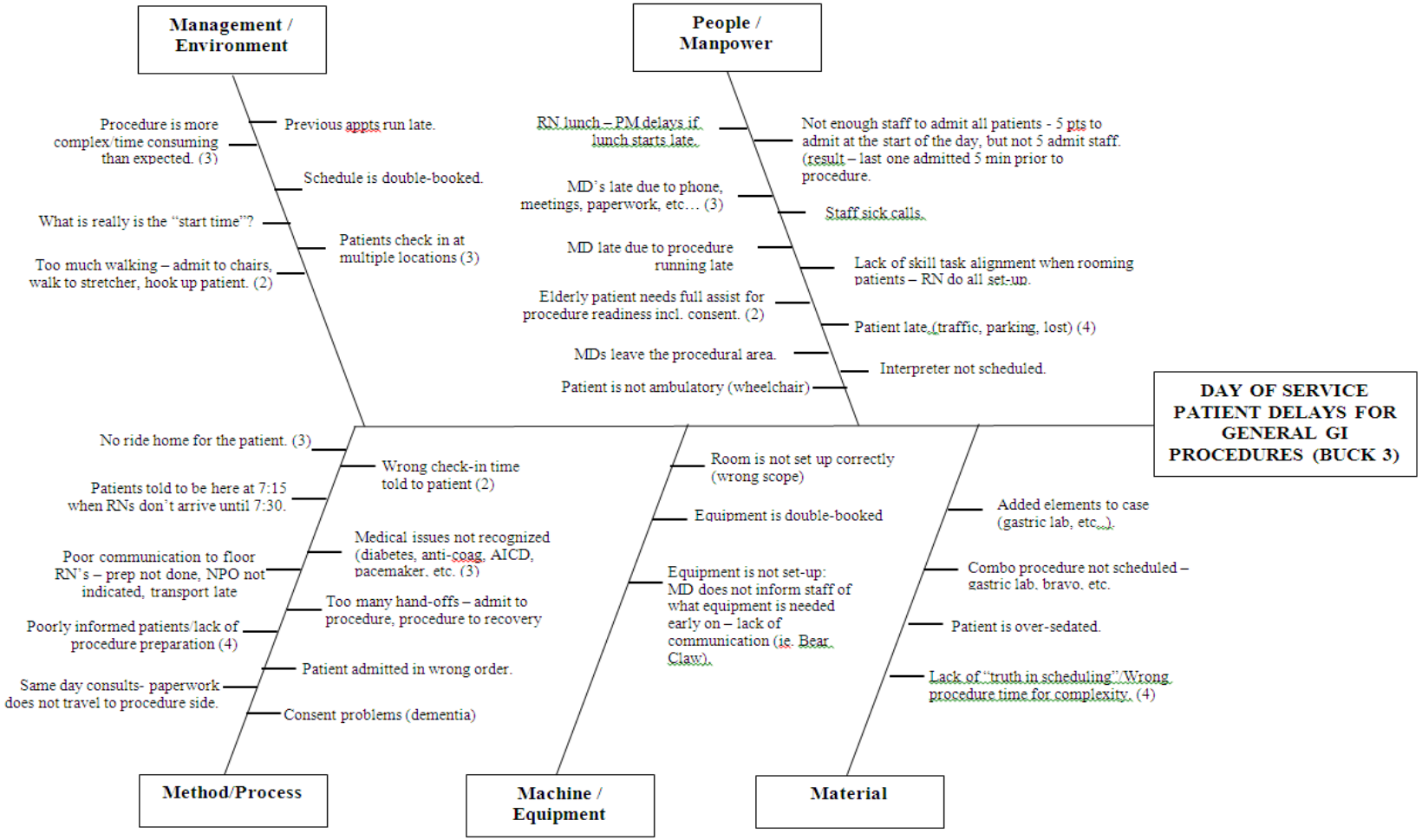
Example of Fishbone for RCA



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Step 5: Identify root cause solutions, assess them and test preferred alternative

You can only improve your business if you now take action.

VMPS as management methodology enables us to:

- Understand the current state-Standard Operations
- Solutions to test-Idea generation
- Improve-VMPS Methods
- Continual Improvement-Kaizen Action Plan (multiple roots?)

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Step 6: Implement root cause solution

- Change Management
- Training
- Communication

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Step 7: Monitor and revise the solution as indicated by performance data

- Production board tracking
- Assess if multiple roots exist for the same problem
- Kaizen action plan lets you have a structured plan for addressing ALL identified roots.

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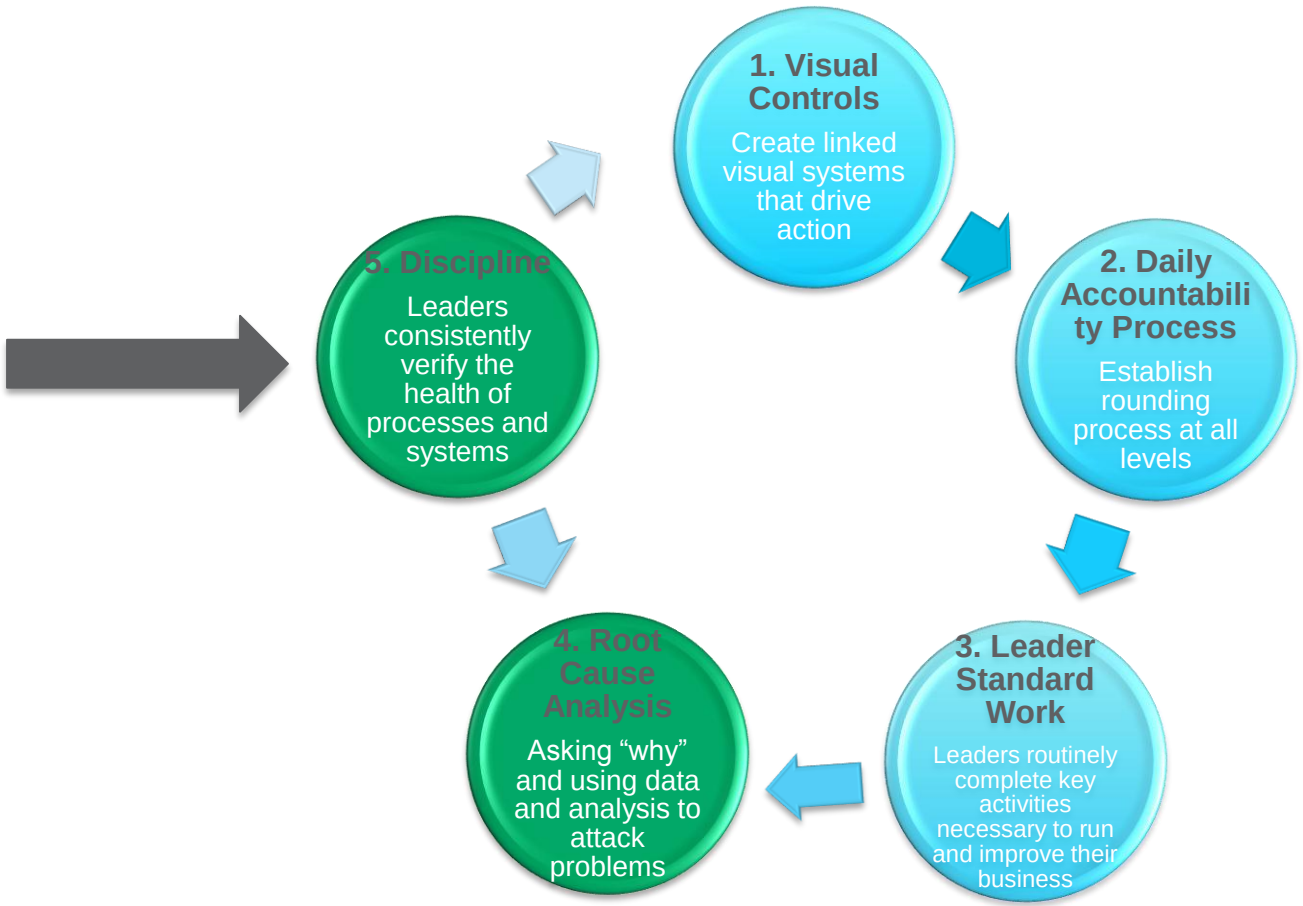
Discipline



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Discipline

- The adherence to a defined process
- Lack of follow through/rigor (discipline) is the leading cause of ‘failure’ in a lean culture
- This is the at a minimum Genba walk in action

How do you build accountability into your work?

What leader behaviors exhibit commitment, relationship, reliability and inspiration?

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Discipline on the Genba

Location: Cardiology Clinic Leader:	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	Observe discharger station - instructions to patients, "did we meet all your needs today", flow	Shadow Flow Manager(s) - on rooming sequence, check medication history taking process (use of last compliance, does patient need refills, use	Recognize staff	Ask Flow Managers to demonstrate how they prepared for the day and when possible, observe MD/FM huddle	Observe the waiting room area - are patients being asked to ring the bell in CVL, are they waiting, what has been their experience
Week 2	Listen in on appointment phones and watch for how messages are taken (is template used, is subject line standard, is routing clear). Also, look	Check status of Problem List entry - review report and interview staff	Standard Work for Rounding - complete with 2 staff members (one either a MD or ARNP)	Observe on-call interventional clinic patients - are patients waiting or seen on time, is the FM on top of it, what contingency plans	Observe the process for new standard work developed this month
Week 3	Observe the check-in desk - what is working, what could be improved	Review staffing plan in the ECHO area - do volumes support the staffing levels and if not, what staff plan is in place for today - how is it	Observe Flow Manager(s) - what is in their inbox and the inbox of the MD he/she is responsible for	Ask Flow Managers at 10 a.m. and/or 2 p.m. what the last patient was that was roomed - how often does it happen and what counter-actions are in	Review Standard Leader Boards and Vis Wall
Week 4	Standard Work for Rounding - complete with 3 staff members	Ask Flow Managers to demonstrate how they prepare for the day and when possible, observe MD/FM huddle	Shadow Flow Manager(s) - on rooming sequence, check medication history taking process (use of last compliance, does patient need refills, use	Recognize staff -review patient comments from Press Ganey for CT Surgery & Cardiology.	Spend time observing the triage RN - what is working, how are messages documented

This is a monthly calender describing what specific observation will occur on each day. This provides a specific purpose to the rounding and allows the leader to touch the standard work of her area once per month.

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Our team members tell us Daily Management…

- Enables quicker correction of problems
- Provides staff with regular, predictable communication channels
- Makes leaders & their work more visible to staff
- Builds trust & transparency
  - More constructive problem-solving, less blaming
- Boosts quantity/quality of ideas
- Gives leaders more predictability in their day

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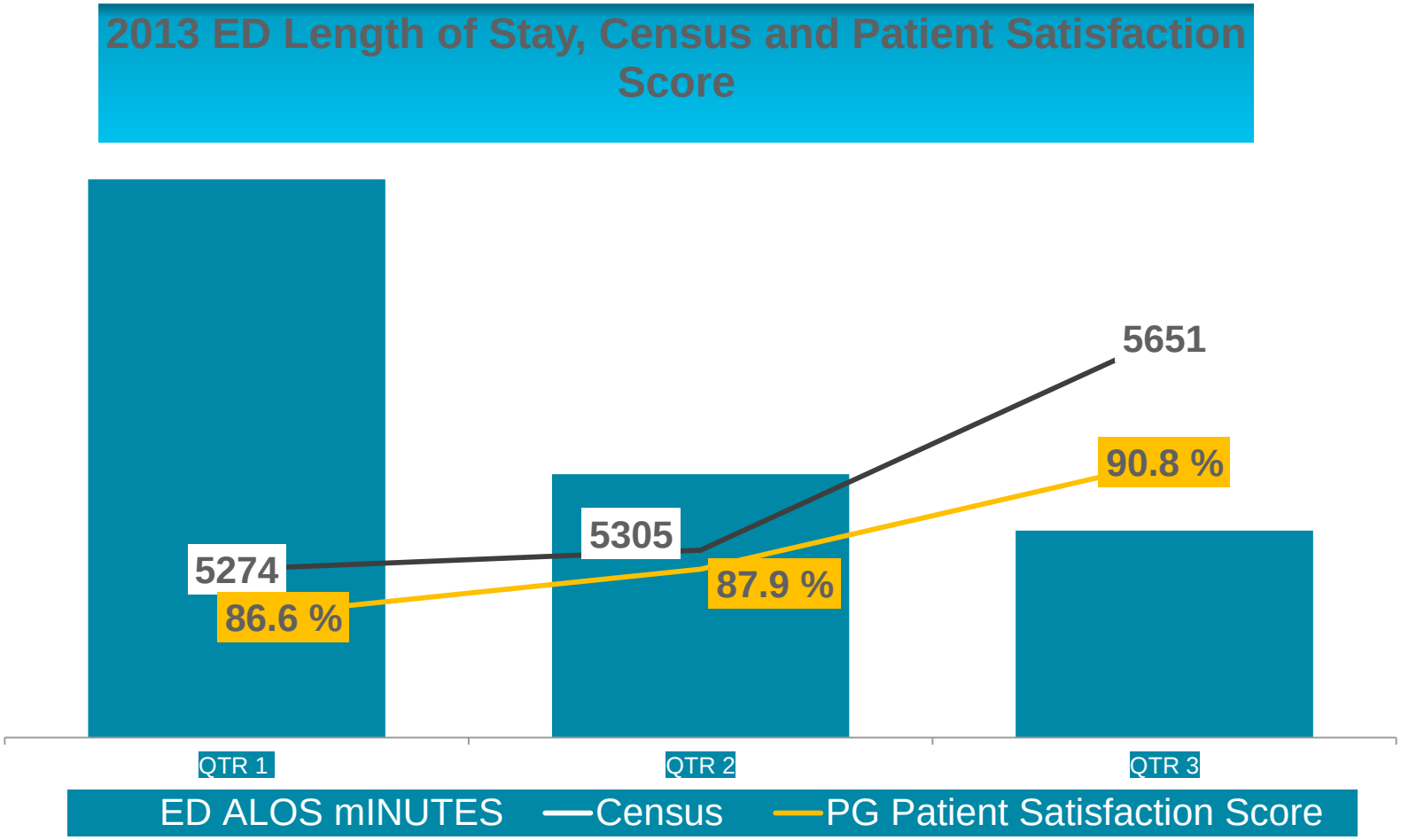
ED Results



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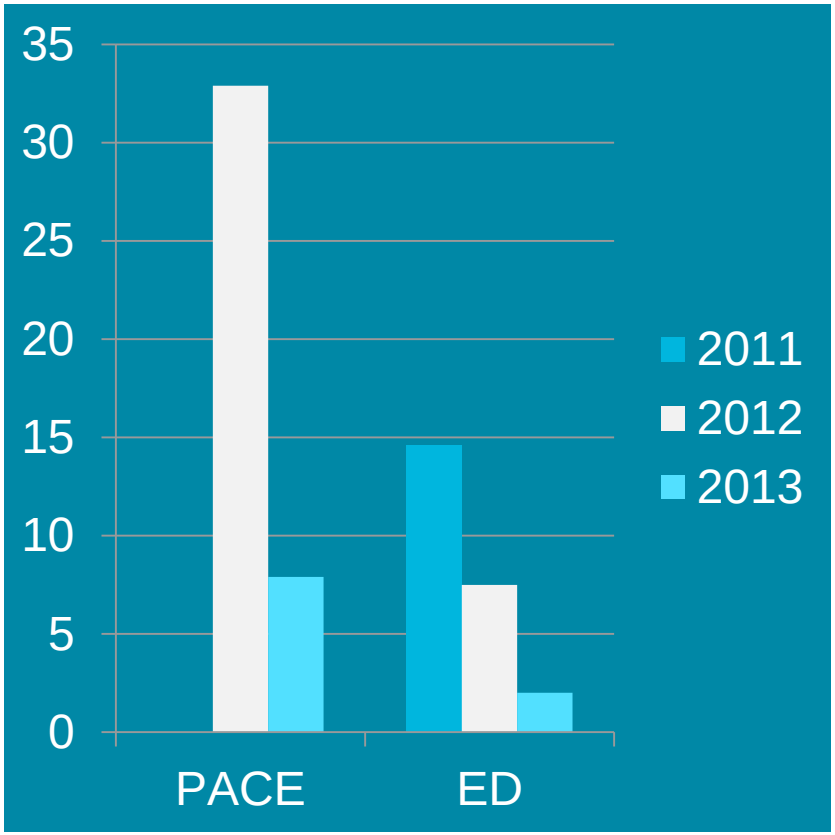
ED Results

Voluntary Turnover %



VMPS Leaders

	Required	Actual
PACE	2	5
ED	4	10

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Phlebotomy - Teamwork

6114 - Virginia Mason Medical Center

9/26/2013 - 10/17/2013

Culture of Innovation Report

Phlebotomy & Reception

	N Size	%Strongly Agree	%Tend to Agree	%Tend to Disagree	%Strongly Disagree	2013 Mean Score	Internal Rank	2012 Mean Score
	36	62.5%	27.8%	5.6%	4.2%	82.9	110	77.5
mix of skills/styles.	36	63.9%	30.6%	2.8%	2.8%	[illegible]	88	81.7
h dignity and respect.	36	61.1%	25.0%	8.3%	5.6%	[illegible]	116	73.3

Members of my work group treat one another with dignity and respect

2012: 77.5

2013: 82.9

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Virginia Mason Lessons So Far

- The rituals are critical
- Leader attitudes and approaches really matter
- Boards are only a tool; they can't be static
- Expect it to take time & lots of experimentation
- Focus on building trusting relationships that can weather change
- Staff idea processes have to be hassle-free

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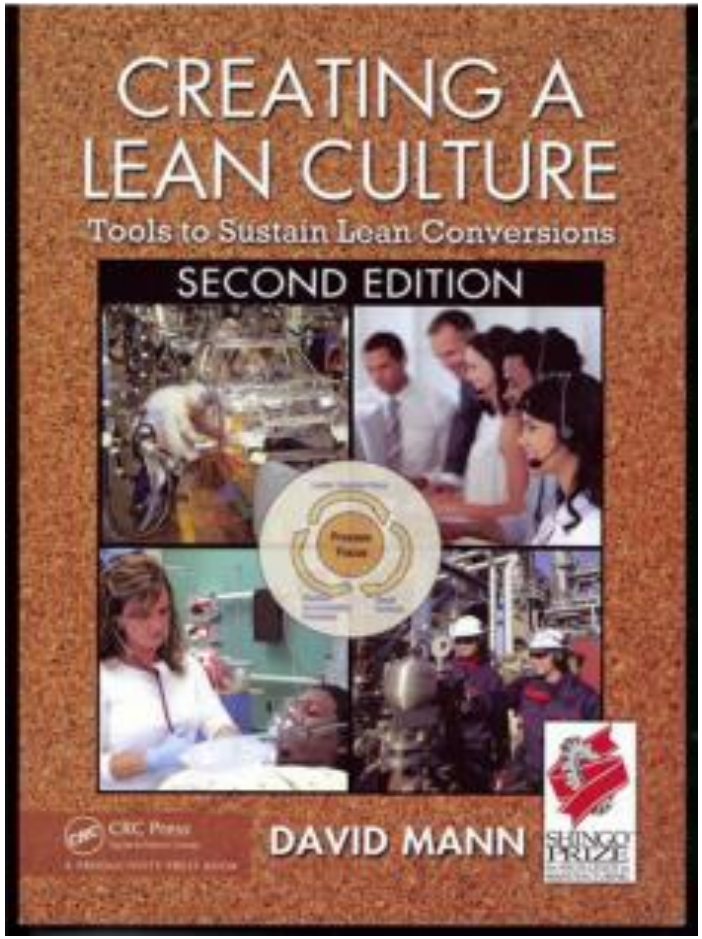
“The intangible benefits of visual controls are remarkable.
The development of teamwork by increasing the level of involvement of the operators in observing, analyzing, improving the process, and understanding the whole and not just their individual work.”

David Mann, Creating a Lean Culture

Daily Management Resource

- What is your business?
- What are you producing?
- How are you running your business?
- How do you identify issues?
- How do you assess root cause?
- How are you improving your business?



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Each Person.
Every Moment.
Better Never Stops.