

MaineHealth
Center for Performance
Improvement

Engaging Front Line and Middle Managers in Lean Daily Management System

Canadian 2019 Lean Summit

April 25, 2019

Ghassan Saleh,

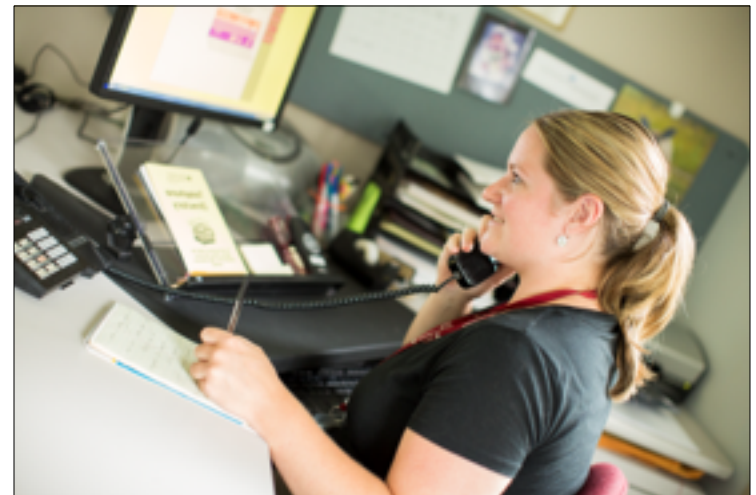
Director, MaineHealth Operational Excellence



MaineHealth Vision: “Working together so our communities are the healthiest in America”

We are...

- Hospitals
- Physicians
- Nurses
- Outpatient care centers
- Home health agencies
- Outpatient surgery centers
- Diagnostic centers
- And much more...



Who We Are

- A not-for-profit, integrated healthcare system serving 11 Maine counties and one New Hampshire county
- Among the nation's top 100 integrated healthcare delivery networks
- Consists of 15 member organizations and 5 affiliates – across 10 different locations in both Maine and New Hampshire
- Committed to supporting **healthy individuals** and **healthy communities**



Our Journey to OpEx

As of Sept 18, 2018 Every member is onboard with OpEx last member to join was WMHC

Our Process

- Leadership and Manager trainings
- Establish OpEx lead at each organization
- Huddle board design and pilot
- Monthly 3 Day Unit Champion Trainings
- Gemba walks begin
- Ongoing training and coaching





Introduction to MaineHealth Operational Excellence

Core Components of a Strong Management System

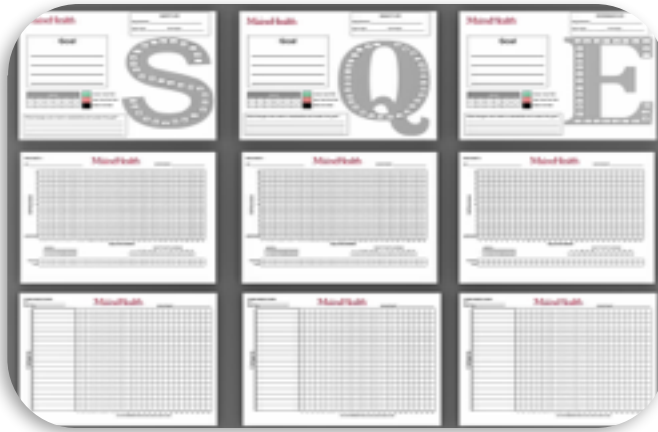
Daily Huddle



Gemba Walks



Data Based Decision Making



Improvement Events



Leadership 15min morning huddle managers and directors invited

SMHC Daily Huddle		Date	BIDDEFORD MEDICAL CENTER																
IP Census																			
Previous Day Admits	22			MS3 (28)	25	=	0	3	(8)	SCU (9)	8	=	0	OB (8)	2	=	0		
Budgeted Daily Census	72.1	Total	84	MS4 (40)	34	=	3	22	(32)					Infants	2				
December Average Census	74.9													Labor/Obs	1				
														Peds/Child (4)	0				
														Peds/Adult	0				
														MHU (12)	12	=	0		
Anticipated Discharges																			
Previous Day DC's	18			MS3 (28)	3					SCU (9)	0			OB (8)	0				
Budgeted Daily Discharges	16.0	Total	11	MS4 (40)	8									Infants	0				
December Average Discharges	17.3													Peds/Child (4)	0				
														Peds/Adult	0				
														MHU (12)	0				
ED Census																			
Previous Day's Visits	109																		
Budgeted Daily Visits	96.9	Total	8	Staffing	=	Admits	2	EDAP (4)	1	Non-MH Boarders	0								
December Average Visits	95.3					Tele	1			MH Boarders	1								
OR Cases																			
Previous Day	13																		
Budgeted Daily Cases	18.0	Total	10	AM Admits				Cancelled											
December OR Cases	20.1																		
Case Management																			
		OBS <23h	3	↓	OBS >48h	0	↓	LOS 4-10	25	↑	LOS >10	8	↓						
November LOS	4.13										Boarders	5	↑						
December Budgeted LOS	4.26																		
Target LOS	<4																		
Previous Day EVS Room Turns (IP Only)																			
	35																		

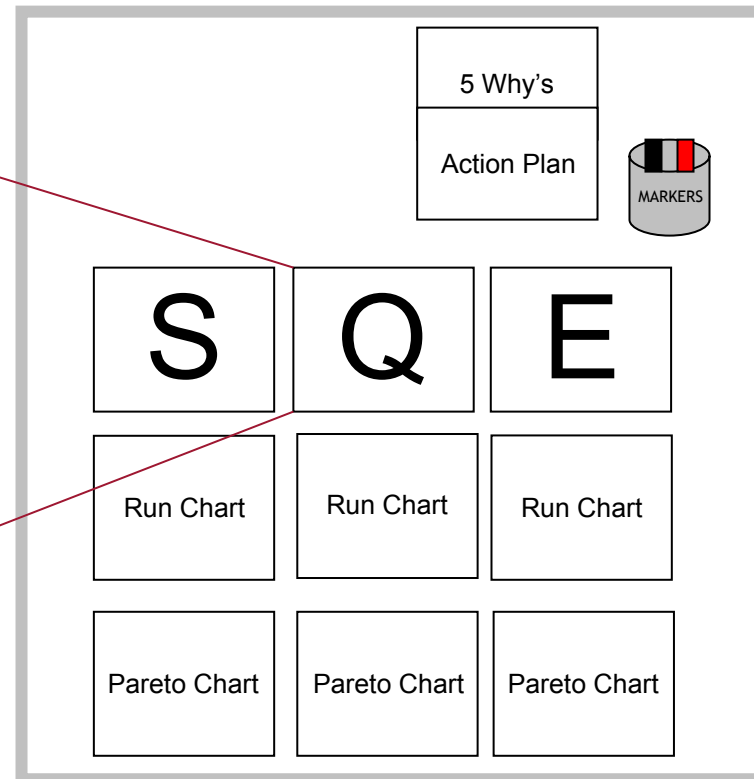
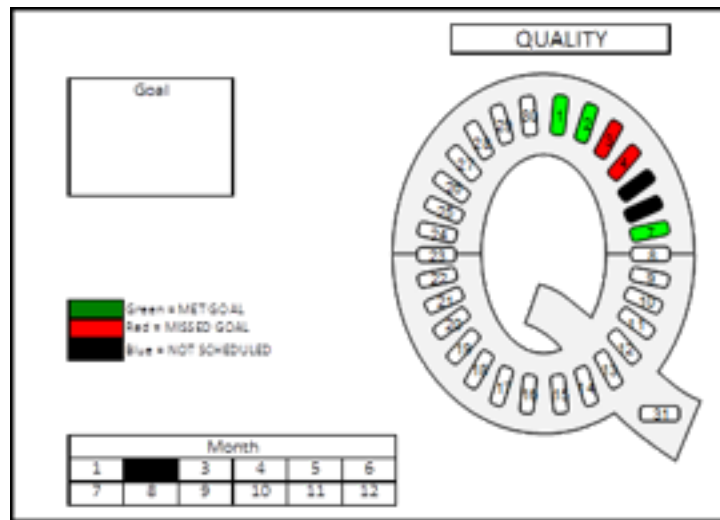
Staffing Key
 ↑ Above Census Needs
 ↓ Below Census Needs
 = Adequate Census Needs

Case Management Key
 ↑ Increase from yesterday
 ↓ Decrease from yesterday
 = Same as yesterday

Core Components of a Strong Management System

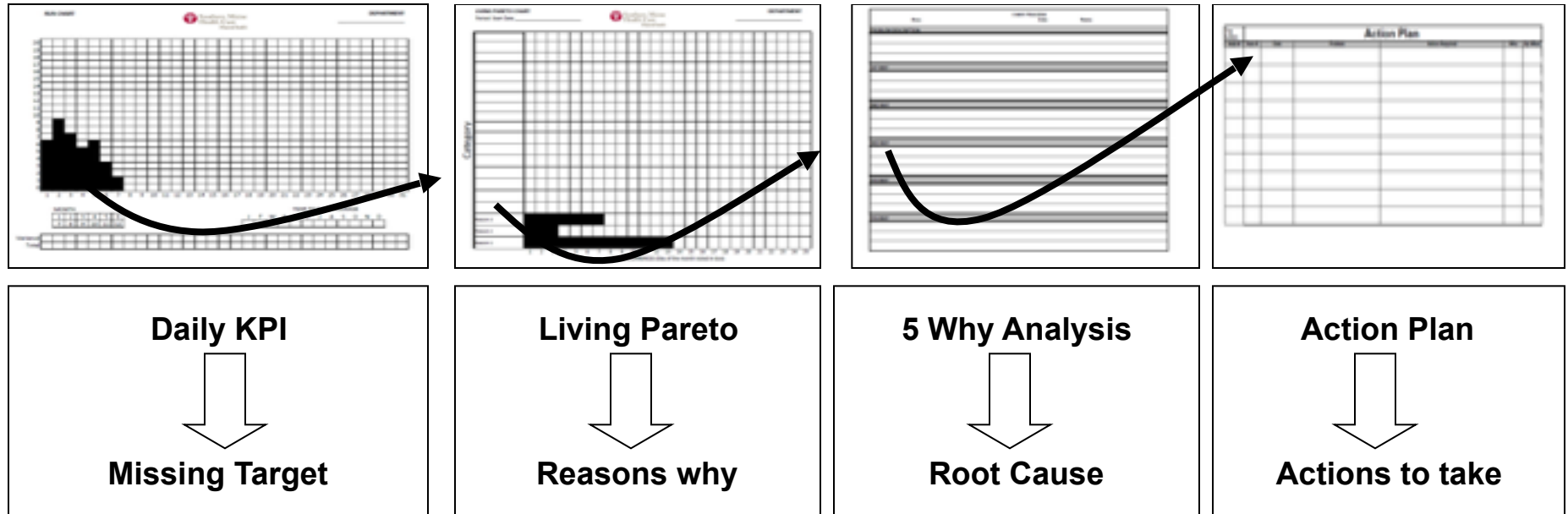
Gemba Walks – Daily visits to the work units

- 1 hour standardized walks that lead top level managers to each unit of the organization
- Staff provide a report on improvement efforts as well as general operating status.
- Leaders provide staff with support, big picture views, and coaching



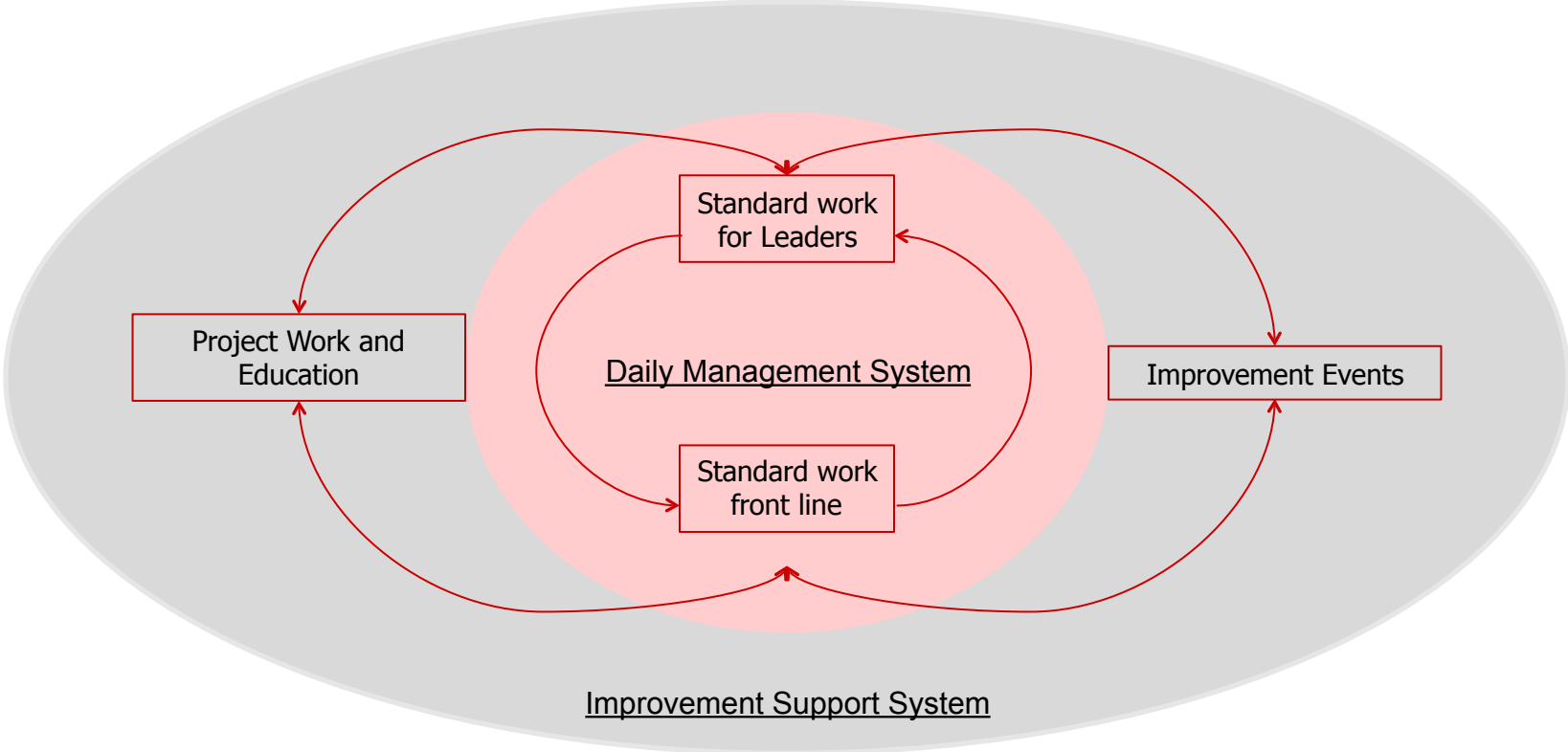
Focused Problem Solving

A systematic, data driven, visual approach identifies and solves key problems causing below target performance



Standard problem solving methods lead to true root cause solutions resulting in improved and sustainable performance.

Operational Excellence Model



Challenges We Have Faced

- Manager Engagement
- Perception of Value (ROI and Public Relations)
- Strategic Alignment
- Sr. Leadership Development



Manager Engagement

Challenges in Engagement

- Model emphasis and training focused on “senior leaders” and “front-line.” “Middle” managers felt left out.
- Model had been perceived as requiring managers to be “hands-off.” Despite manager pre-trainings that emphasized a list of managers’ roles
- Some of the champions were too sensitive/afraid to include the managers in OpEx work (developing new KPIs, data collection plans, or even meetings).

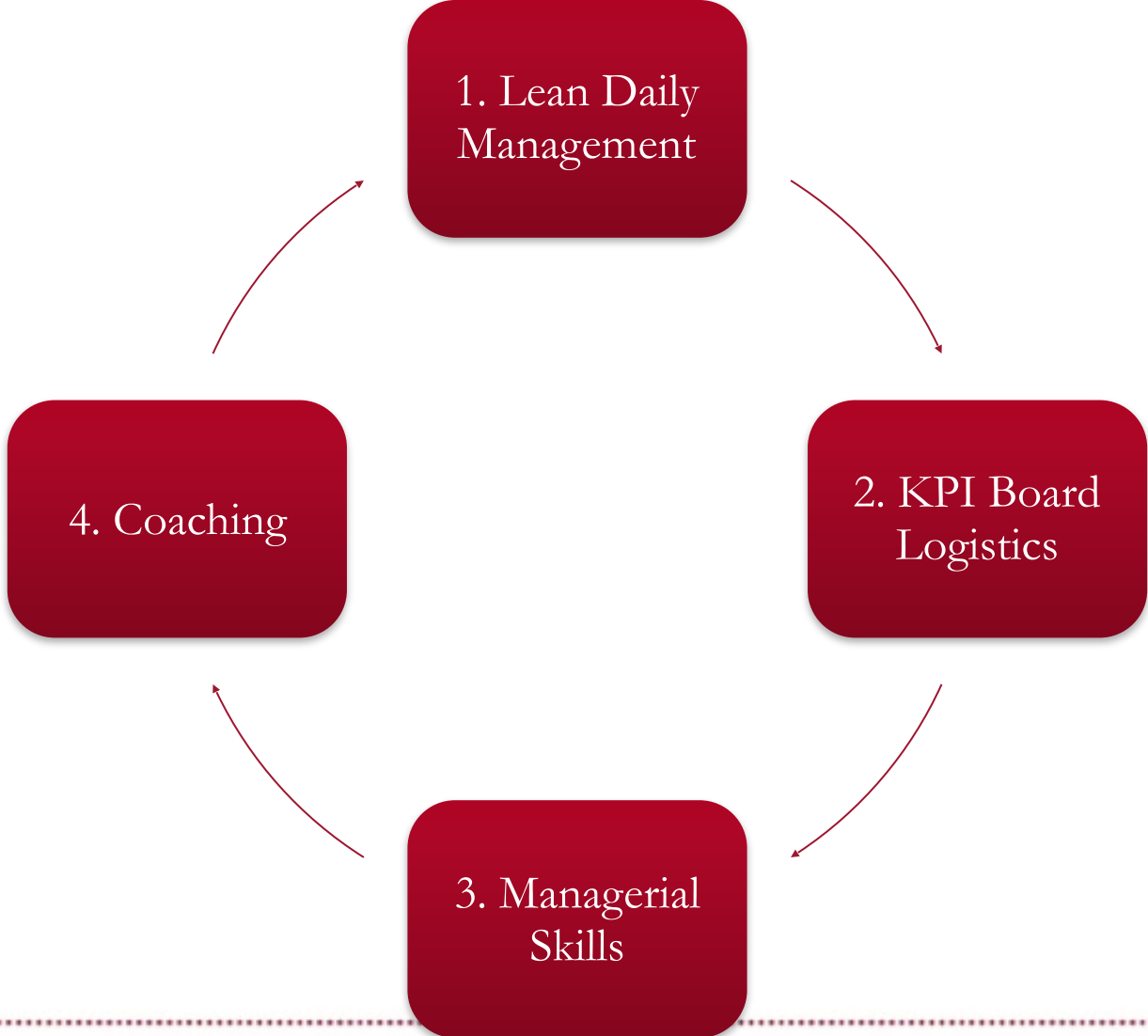


Action Plan

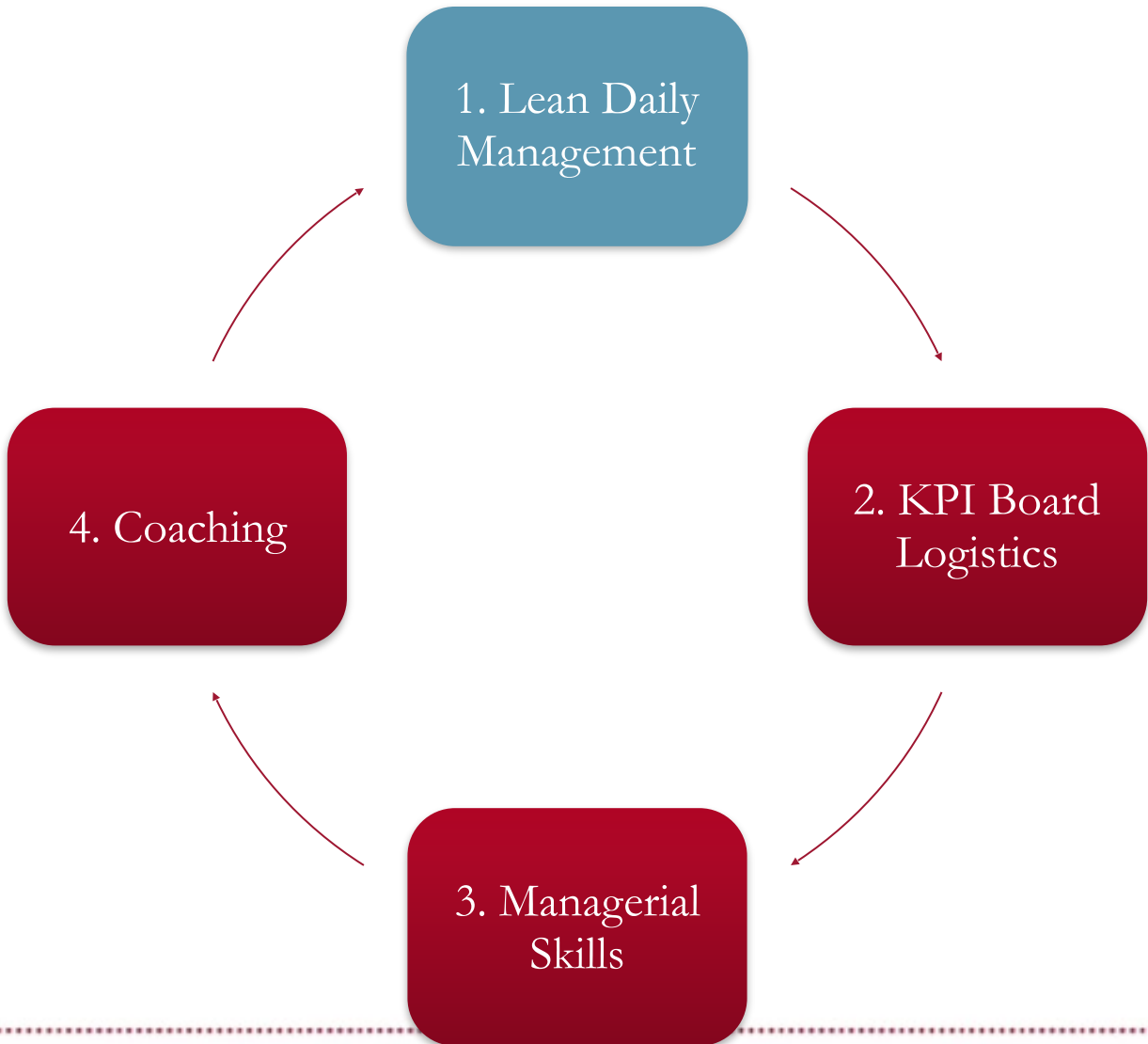
- A taskforce was developed to study the current state, drill the problem into it's root causes and come up with solutions.
- The taskforce included a broad representation.
- While on the work, the taskforce gave updates to all system members through the system wide OpEx Workgroup
- The results are:
 - ✓ Standard work for managers booklet.
 - ✓ Standard work for managers training.
 - ✓ Tools to help managers do a better job dealing with day to day improvement challenges.



The Manual and The Training Covers four Domains



The Manual and The Training Covers four Domains



Lean Daily Management

- Standards were set for how the managers support lean daily management system
- Minimum number of Gemba walks they should join in a week.
- Minimum number of times they should join the organizational huddle

- Tools and ideas on how to do it. E.g. No fly zone
- Tips on how to excel .e.g. support own department KPI presentation, joining different works, and steal shamelessly



Lean Daily Management

- **Tips on the managers' role in more complex KPIs**

A tool on how to deal with interdepartmental KPIs (Appendix A in the document)

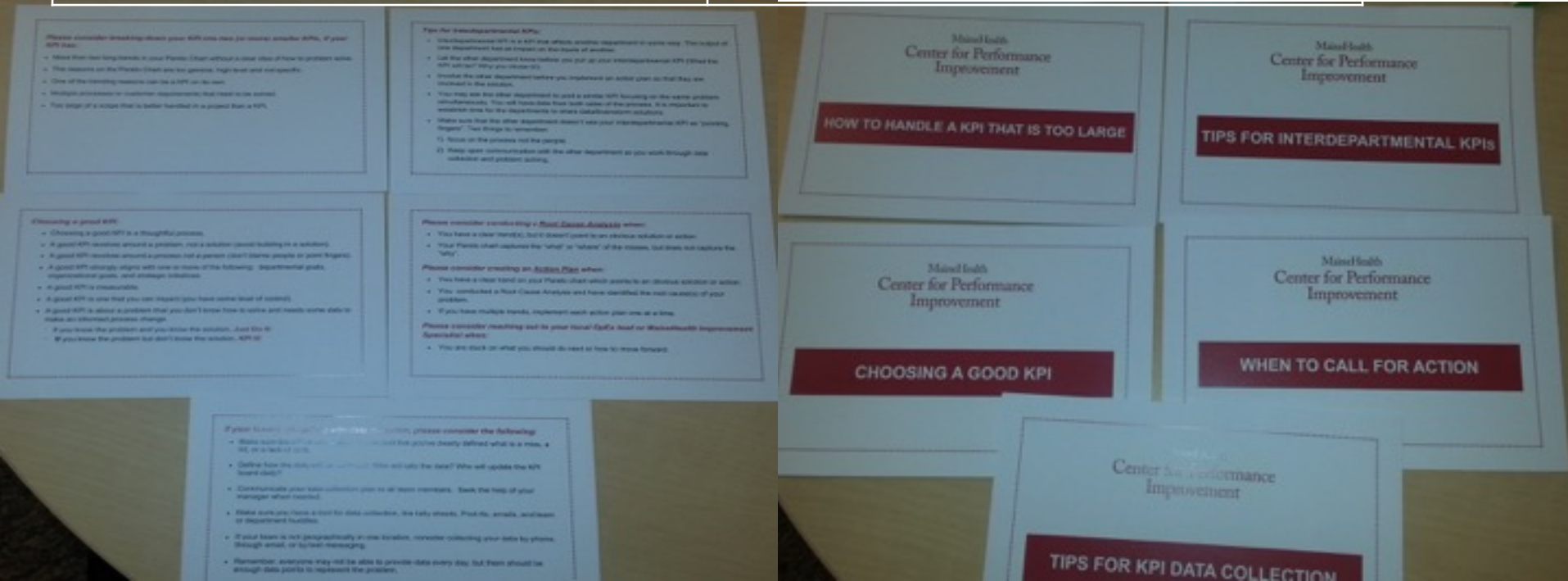
- **A set of flash cards that give specific tips on handling specific situations (a later-on efforts but complimentary):**

✓ How to choose a good KPI

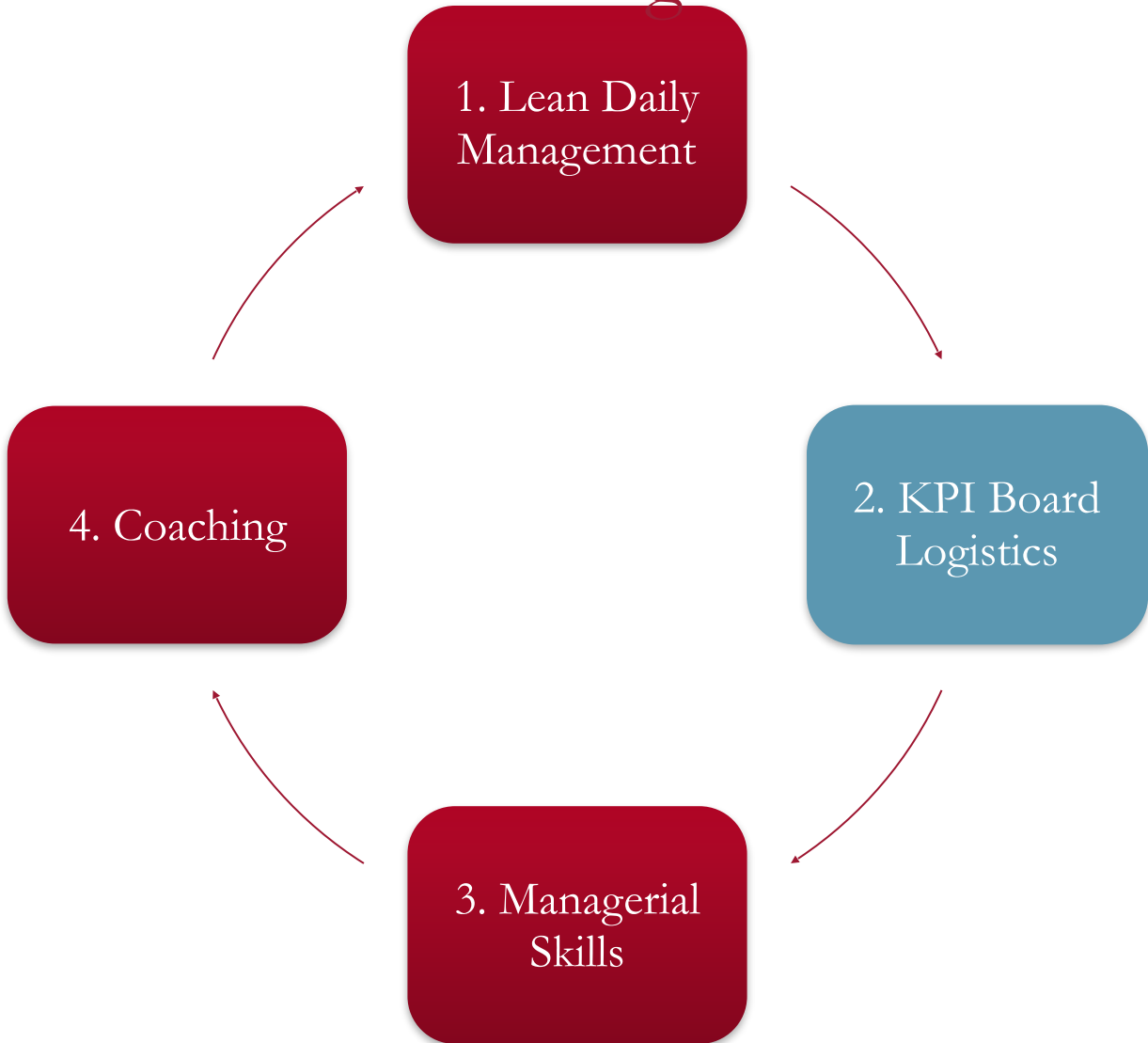
✓ How to handle a big KPI

✓ Determining what to do next.

✓ Tips for data collection

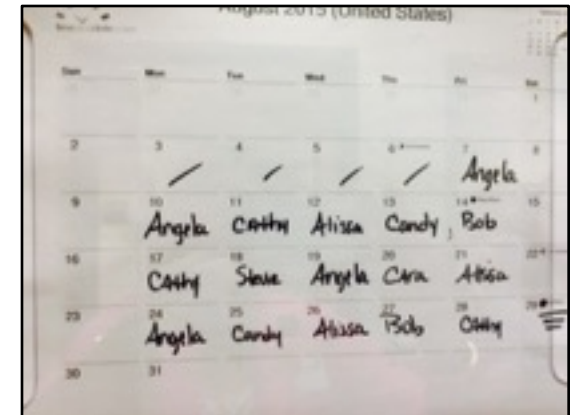


The Manual and The Training Covers four Domains

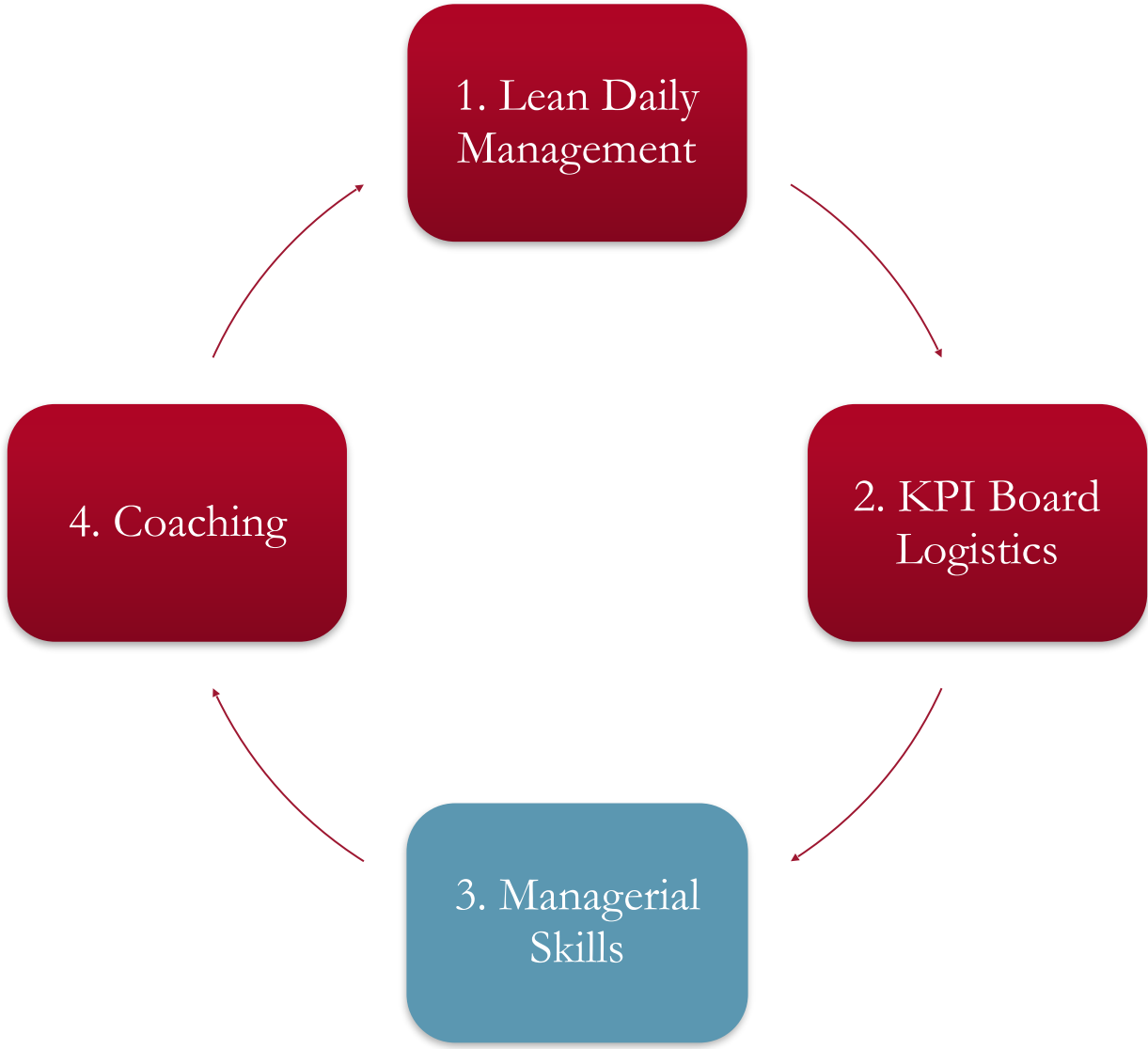


KPI Board Logistics

- A refresher for all the logistics that need to be followed through to keep the machine oiled.
- Tools to make sure that all staff take part in presenting their KPI board (or at least in one of the OpEx activities). Calendars with names of who is going to present when.
- Managers to present their board if staff is tending an urgent patient care
- Tips on data collection plans, tools and examples were shared.



The Manual and The Training Covers four Domains



Managerial Skills

A Suggestion to Establish a daily huddle with your staff.

Why?

- Focus on today! Huddles are an opportunity to check-in with the team daily. It's a chance to share what each team member is responsible for, determine barriers to customer/patient care, discuss safety concerns and share information
- Huddles help:
 - ✓ improve communication
 - ✓ align your team
 - ✓ boost productivity
 - ✓ improve moral



TRAINING ON HOW TO HUDDLE
INCLUDING TIPS, TECHNICS AND EVEN
EXAMPLES OF COMMON QUESTIONS TO
BE ASKED DURING A TEAM HUDDLE

Foster a Culture of Continuous Improvement

- Data-Based problem solving
- Red is Good
- Focus on process, not people
- Blame free environment
- Empower staff to solve department/organization problems
- Don't let perfect be the enemy of better

Example

Department: Operating Room



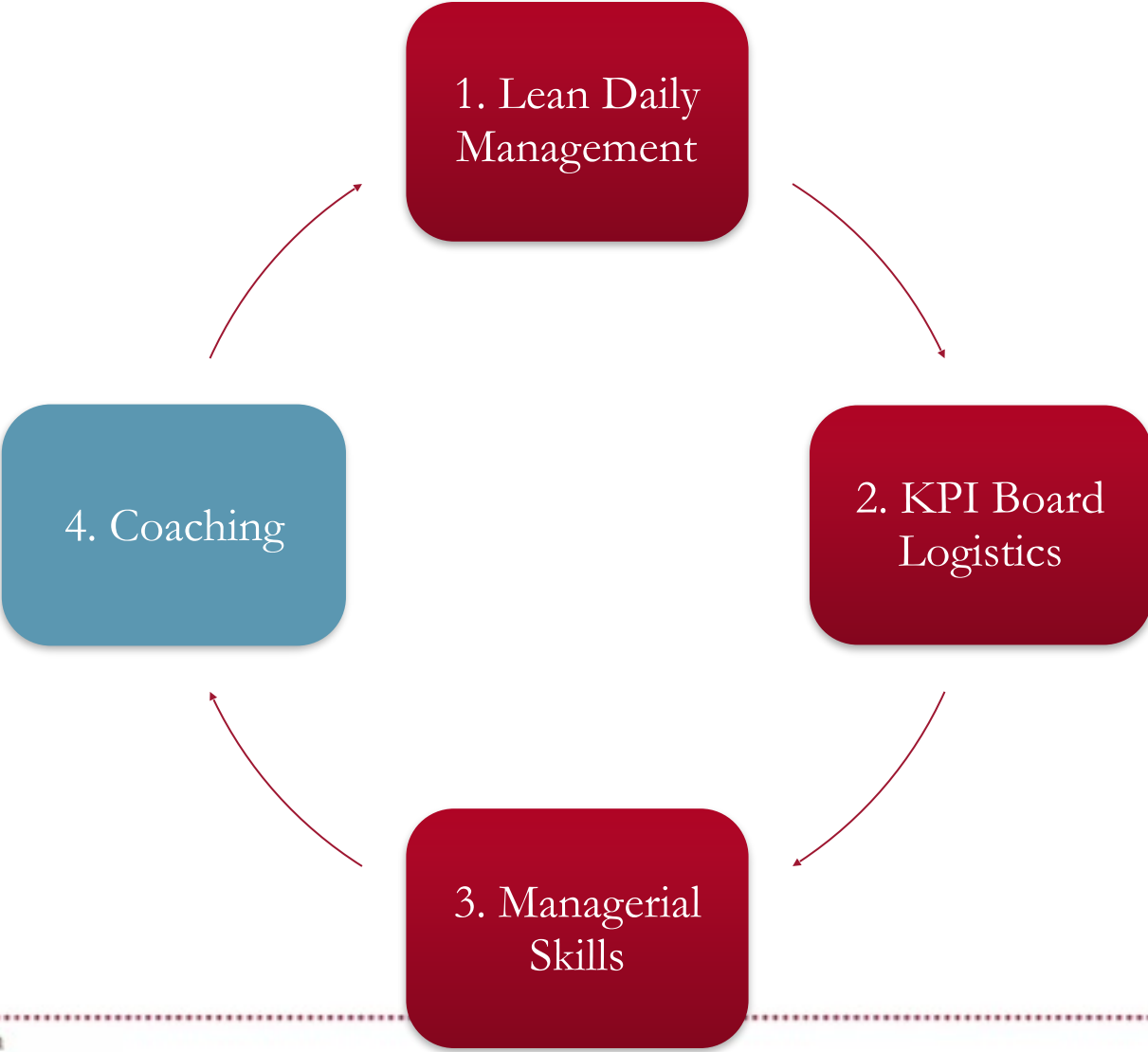
Last Updated: 9/11/17

Strategic Priorities	Department Goal and Target	Status	KPI Letter
Service Delivery Transformation	Total OR minutes per month (10k)	Green	Q
Quality Improvement and Patient Experience	Infection Rates (<0.01%)	Yellow	S
Financial Performance	Total supply expenses for OR cases (<\$20k)	Red	F
Community Engagement	HCHAP score (>85%)	Yellow	E
Population Health and Wellness	Procedure delay (<60 minutes)	Yellow	E
Workforce Development and Engagement	Employee engagement (>70%)	Green	E

Cent
improvement

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The Manual and The Training Covers four Domains



Managing as a Coach

- Coaches assess ALL aspects of their athlete. That includes current health & wellness characteristics, fitness ability and life-style.
- Coaches provide direction and the plan.
- Coaches provide logical feedback to the athlete when needed.
- Coaches provide support when needed.



COACHING TIPS ON HOW TO
FACILITATE IMPROVEMENT ACTIVITIES
BY ASKING THE RIGHT QUESTIONS
WERE TAUGHT

Results of Standard Work for Managers Training

- Rave reviews for the training.
- Little changes on the Gemba walks.
- Improved knowledge of managers, but still very busy to act on their new knowledge.

Fellowship Course Structure

- 4 sessions 4 weeks apart
- Department Self-Assessment
- Homework Review
- Content
- Energizer
- Interactive Activities
- Homework Assignment
- Peer-to-Peer Discussion
- Advisor

Operational Excellence Manager Self Assessment

	Baseline	Current State
Coaching	Needs a Little More Work 1.00	Almost There 3.00
Strategy Deployment	Needs a Little More Work 1.00	Almost There 3.00
Improvement Tools	Almost There 3.00	Great Job 4.00
Engagement	Almost There 3.00	Great Job 4.00

Frequency Rating: Never = 0 Rarely = 1 Occasionally = 2 Frequently = 3 Almost Always = 4

	Baseline	Current State
Coaching		
I encourage my team to identify trends and facilitate discussion regarding next steps.	1	3
I provide structured time for Operational Excellence	1	3
I help my team by removing obstacles to Operational Excellence	1	3
Strategy Deployment		
I am aware of the bigger picture and communicate it to my staff	1	3
I regularly share my department metrics with my team	1	3
The team uses department metrics, hospital goals and/or strategic initiatives to identify and select KPIs	1	3
Improvement Tools		
I facilitate the use of improvement tools	3	4
The team introduces improvements through process changes, not only awareness	3	4
I track the progress of the action plan and intervene when necessary	3	4
Engagement		
I am present for the KPI board presentation or on the Gemba walk	3	4
Different team members update and/or present the KPI board	3	4
The team collaborates to select KPIs and implement action plans	3	4

Managers Fellowship

- What is Coaching?
- Choosing a good KPI
- When to call for action
- Prioritizing coaching opportunities
- Coaching flash cards

COACHING

- Hoshin Kanri
- The need to focus
- MaineHealth strategic deployment
- Tools for strategic awareness and alignment
- The Balanced Scorecard

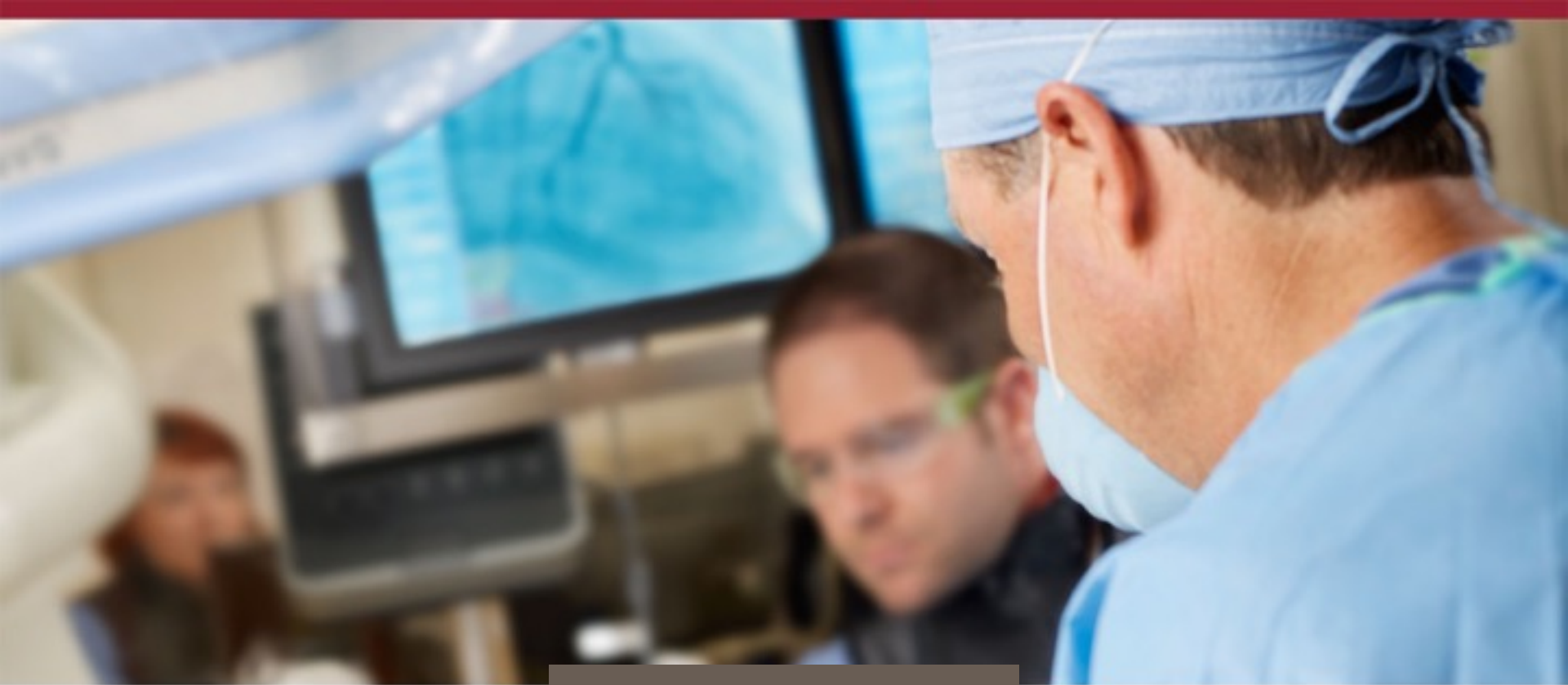
**STRATEGIC
DEPLOYMENT**

- Engagement ideas
- Report out on assignments
- Peer to Peer Discussion
- Hot Topics Panel Discussion

ENGAGEMENT

**PROBLEM
SOLVING/
IMPROVEMENT
TOOLS**

- Why Problems Stay Unsolved?
- Problem Identification and Problem Analysis
- Solution Prioritization and Selection
- Error Proofing and Visual Management



Perception of Value

2017 Maine Quality Counts Improvement Leadership Award



The **QC Quality Improvement Leadership Award** recognizes an individual or organization that has introduced innovations, used creativity, and embraced risk-taking in their leadership of demonstrably successful quality improvement initiatives.



OpEx Celebration

AGENDA:

- Opening Remarks—Bill Caron
- Advocate Awards:
 - *Introduced by Jordan Peck
 - *Awards presented by Omar Hasan
 - *Group Photograph
- New OpEx Video
- KPI Team Awards:
 - *Introduced by Ghassan Saleh, Abigail Am, Joyce, Melissa Zelaya-Floyd
 - *Awards presented by OpEx Leads
- Closing Remarks—Omar Hasan
- Socializing



OpEx Dashboard

MaineHealth | Operational Excellence FY2018

MaineHealth
Center for Performance
Improvement

Fiscal Year: Select all 2018 2019 Quarter: Select all Q1 Q2 Q3 Q4

Select all	Franklin Community Health Network	Information Technology	LincolnHealth	Maine Behavioral Healthcare	Maine Medical Center	Maine Medical Partner	MaineHealth	Memorial Hospital	NorDx	Pen Bay Medical Center	Southern Maine Health Care	Waldo County General Hospital	Western Maine Health
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A view of our operations

- 2309 CLOSED KPIS
- 8 KAIZEN EVENTS
- 82.1% of Gemba Walks led by required role
- 93 PROJECTS
- 6 VALUE STREAM MAPS

Strategy Deployment

59.2% of KPIS are strategically aligned

Quality, Safety, and Patient Experience

- 2061 CLOSED KPIS
- 8 KAIZEN EVENTS
- 80 PROJECTS
- 9 VALUE STREAM MAPS

Finance & Growth

- 280 CLOSED KPIS
- 0 KAIZEN EVENTS
- 13 PROJECTS
- 1 VALUE STREAM MAPS

Building Local Capacity

219 New lean certifications

Level	Count
Lean Foundation	55
White Belt	96
Green Belt	66
Black Belt	2

Employee Engagement*

69.4% of employees agree that Operational Excellence helped their department make meaningful changes

*Includes percentage of employees that responded Tend to Agree, Agree, and Strongly Agree.

Return on Investment†

- \$166K SOFT SAVING
- \$399K HARD SAVING

†Return on Investment calculated for projects and Kaizen events only.



Gemba Watch!

What is Gemba Watch!?

- Short unscripted, unpolished video vignettes
- Everyday success stories
 - KPIs
 - Values
- Accessible
- Quick way to share information

Videos

- Patient Experience
 - MMP, Access to Care
- Process Change
 - FCHN, PT/OT
- Punch In, Punch Out
 - LincolnHealth Accounting



Moving Forward

Maturity Model

LEVEL 5

LEVEL 4

LEVEL 3

LEVEL 2

LEVEL 1

Habit Forming: The organization is beginning to explore operational excellence and get in the habit of data collection and problem solving.

- Managers:
- are feeling burdened with extra responsibility.
 - are unsure of their place in the process.
 - help to encourage KPI selection but feel powerless.
 - work to assign staff to present at KPI boards.
 - are concerned that some unit KPIs point the finger at their unit for issues.

Exploration: The organization has become comfortable with the tools and goals of operational excellence and begin to explore how to use them to fit the organizational needs most effectively.

- Managers:
- continue to feel burdened and are seeking to reduce meeting work load.
 - are regular attendees at daily activities
 - own issues identified by other units and share with their staff.
 - are the face of their unit and communicate their KPIs with colleagues.
 - Some are having greater success than others
Managers have desire to own KPIs but hold back.

Activation: The activities of operational excellence are now habitual in the organization. They begin to be used to replace some activities that took place in the old culture

- Managers:
- have shared best practices between themselves.
 - are emerging as leaders in their unit rather than high performing staff members.
 - are actively engaging their staff to identify KPIs and facilitate discussion.

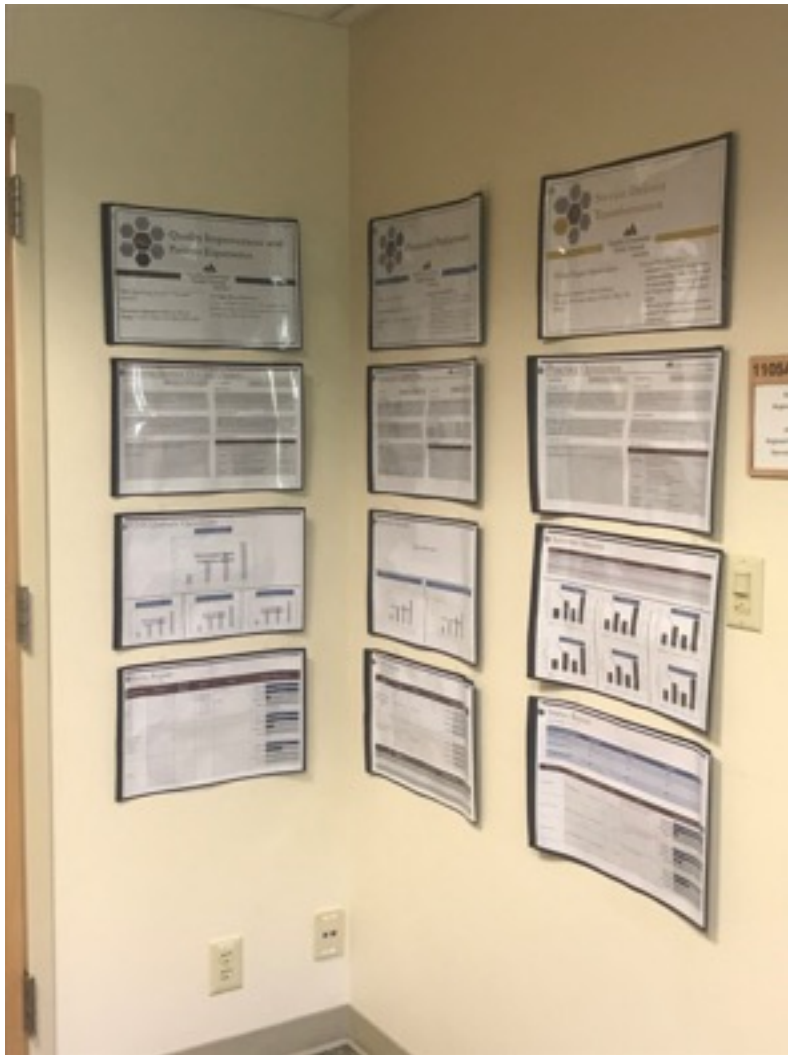
Building: The activities of operational excellence are fully understood and being used as the basis for integrating other efforts and tools.

- Managers:
- gain great familiarity with improvement methods and encourage use of tools from staff.
 - use meetings to identify high impact KPIs and present KPIs to their staff for consideration.
 - coach their staff through problem solving.
 - are comfortable with staff identifying and selecting KPIs.
 - continue to gain a big picture view of the organization by attending daily activities and use this view to enrich activities in their own unit.
 - use no fly zone time to round on staff.

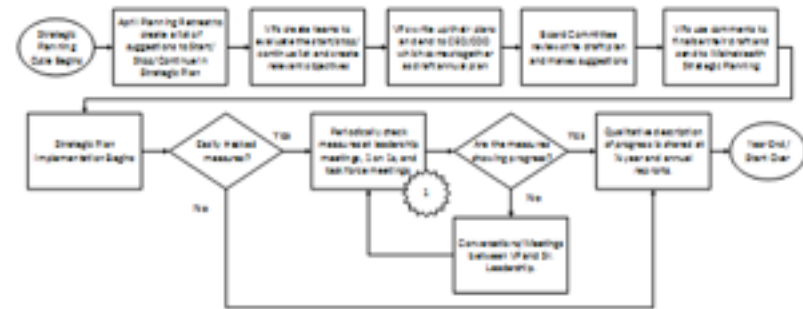
Maturity: The organization fully utilizes the elements of operational excellence. The tools and methods become second nature.

- Managers
- Know that capability with improvement is part of the assessment when promoting staff to management rolls.
 - are seen as experts and mentors in improvement methods.
 - facilitate staff discussion which already target high impact KPIs.
 - coach their staff on improvement methods.
 - continue to gain a big picture view of the organization by attending daily activities and use this view to enrich activities in their own unit.
 - use no fly zone time to do focused rounding on staff.
 - establish unit status boards that address the bigger picture, ongoing projects, as well as the KPI board.

Hoshin Planning

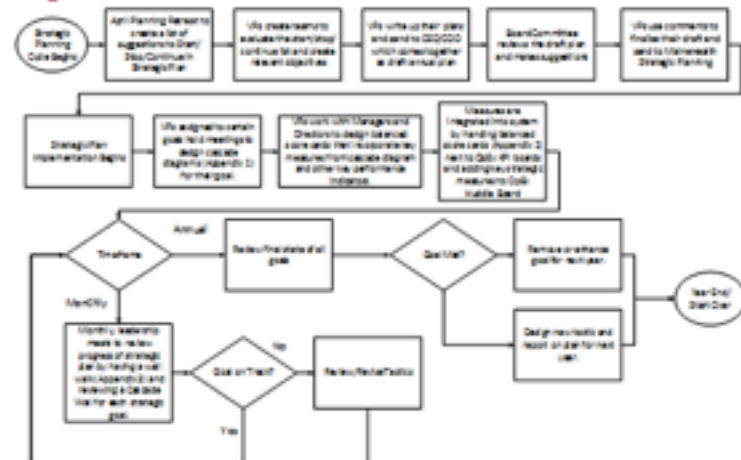


Map The Current State



1. This is very dependent on the QOD team being to ask. Test this is only on a project manager for tracking.

Map of Potential Future State



Standardized Training Portfolio

PROGRAM	TARGET AUDIENCE	DURATION	FREQUENCY	CENTRAL	LOCAL	PREREQUISITE
PROCESS IMPROVEMENT METHODS*						
White Belt—In-Person class	All staff, managers, residents, new hires.	One-day	Five times a year	X		No
White Belt and Lean Foundation — Online classes	All staff, managers, residents, new hires.	4 hours of online training	Available free of charge, all year via www.golearner.com/mainehhealth			
Green Belt** In-Person class	<ul style="list-style-type: none"> • People are nominated on case by case basis. • People in quality or performance improvement role • People with active Gemba coach role 	Four days (three weeks apart)	Once a year	X		Yes***
Black Belt	<ul style="list-style-type: none"> • Improvement Specialists • Managers/staff in quality & safety roles. • Managers/directors who show aptitude for process improvement, and are interested in coaching others. 	120 hours of online classes through Acuity Institute	Available anytime via our partnership with Acuity. CPI offers 30% discount with coupon code.	X		Yes****

OPEX TRAININGS

KPI Champion Training	All Frontline staff to replenish the pool of our champions. Also available via www.golearner.com/mainehhealth (eight videos) under "MaineHealth Operational Excellence."	Four hours		X	X	No
Standard Work for Managers / Directors	All managers and directors at front line and middle management levels.	Four hours		X	X	No
OpEx Managers—Fellowship	<ul style="list-style-type: none"> • Managers who want to take OpEx to the next level and willing to coach and share with their peers. • Physicians in leadership positions. 	Four—3-1/2 hour sessions four weeks apart	Once a year	X		No
Advance OpEx and Improvement Tools Training	<ul style="list-style-type: none"> • Gemba coaches. • KPI champions who want to be better equipped with coaching and facilitation skills. • People want to take the green belt and they haven't been through the 3-day champion training. 	One day		X	X	No

* Participants will receive a certificate of completion on all trainings of process improvement methods whether in-person or online through Acuity Institute.

** Also offered online for those who are really interested, but too busy to make it to the in-person class. All applicants need to answer to an aptitude test to be considered for enrollment. All of the class participants will take part in a green belt project with the help of black belt coach.

*** Need to attend the "advance OpEx and improvement tools training" if you haven't been through the 3-day champion training.

**** People are considered on case by case basis; you can also have your department pay for it.

THANK YOU

