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| **Task**  | **Date of Task** | **Date of SRLD** |
| Filing Death Certificates | March 17, 2014 | April 8, 2014 |
| **Organization** | **Facilitator** | **Participants** |
| DeKalb County Board of Healty | Dianne McWethy/Susan Floyd | Wanda Cason, Hannah Gary, Debbie Johnson, Trishuna Brown, Jackie Hill |

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| **STATUS** |
| **Measures***What are the measures of success?* | **Targets***What was supposed to happen?* | **Results***What actually happened?* | **Achievement***At, Above, or Below Expectation?* |
| Project Measure | Reduce time for death filing | Time savings of 2 hr 20min/day for dedicated clerk | TBD |
| Project Measure | Reduce staff involvement in death filing | Reduce other staff involvement by over 50% | At Expectation |

| **+ What was positive that helped you achieve the results? (Accelerators)** |
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| **REASONS***(What led to results and achievement?)* | **LEARNINGS***(What advice and benefit?)* | **DIRECTIONS***(What actions, Who will do them, When will they be done?)* |
| **Machines (Systems and Equipment)** |  |  |
| LCD projector with powerpt presentation | Allowed for visual support for learning opportunity | Presentation will be used as template for future events. Will be retained by S. Floyd and D. McWethy |
| Computer | Job aides completed onsite; Value Waste Analysis completed with positive, immediate support as to what could be | Protocols, revised filing requests, death filing guidelines completed during Kaizen event. Also included revised versions of certificate requests. |
| POS/QuickBooks | “Plug and Play” software allowed for immediate relocation to alternate desktops | Work order through IT performed to install software on manager’s desktop in office. Completed by IT the week after event. |
| Copier | Dedicated copier for death clerk | Work order through Internal Services was performed moving copier to death clerk area. Completed prior to Kaizen end. |
| Scanner | Allowed for independent standalone scanning opportunities for death filing; replaced 3 manual tracking processes | Scanner installed by IT and moved to death filing inspection desk. Training by IT occurred the week after the event. Complete. |
| Telephones | Able to modify incoming main telephone auto-attendant and individual phone messaging to reduce interruptions while still providing customer service  | Worked with telecommunication staff to record and program new messaging. Completed 4/4. |
| **Methods** |  |  |
| Pre-event training | Two weeks before actual event, a two-hour mandatory training was held to introduce the team to Kaizen, continuous improvement, working with others and value and waste. This provided a common focus for the team and generated excitement in advance of the actual event. These areas were also reiterated at the beginning of the actual event. | Continuous reinforcement of the team concept in support of continuous improvement is ongoing through weekly meetings and ad hoc check-ins. |
| Process mapping | Considerable time was invested in understanding the goal and mapping the current process. Onsite observation with time and motion study was invaluable in defining current state. It was a bit challenging to have the entire team being the same staff that perform the actual duties. . Assigning each team member a defined task assisted with overall observation. | The team was involved in mapping, with appreciated support from Jennifer during onsite survey.  |
| Waste and Value Analysis | After understanding waste and value, the team fully embraced these concepts and were not shy about identifying waste. This led to the “Whys” quite easily. | Ongoing reinforcement of identifying waste is supported by installed fishbone diagram in work area, with post-it notes and waste definitions. These will be discussed during weekly meetings. |
| Root Cause Analysis | Valuable in identifying redundancies and prioritizing solutions. | Staff will continue to ask “Why?” and post their proposed solutions for discussion during meetings. |
| Daily report out | Helped to re-focus the team, especially in the area of talking over each other | Will continue to encourage “working together” concepts, especially during weekly meetings |
| **Materials** |  |  |
| Laminated and foam board mounting of wall charts  | Supported event flow in a polished manner. Was taken more seriously by team and observers since was not “handmade” | Will retain wall charts in secure area. Have used fishbone diagram in work area. |
| Post-it notes, chart paper, markers | Had purchased additional markers and post-it notes, which were needed. Would have liked more Sharpies | Replenishment of supplies will occur prior to the next event. |
| Working with Others books and cards | Had purchased this learning tool, with laminated cards, prior to event | This was a supporting resource to assist in the team’s energy and interaction |
| **Measurement (and Information)**  |  |  |
| Time and process data for death filing | Through extensive and intensive interviews and data collection, had formed a vision for the goal and measurements. At the start of the Kaizen, it was apparent that some of the data was peripheral and not related to the actual goal. Adjustments were made to concentrate fully on the original goal. | Process owner will track the number of death filings on a weekly bases. Supervisor will track number of filings containing errors, as well as time to filing.  |
| Non-death staff resource time for death filings  | Through the mapping process, it was evident that non-death staff were implicated in the death filing process and contributing to overall waste | Have effectively reduced 4 staff involvement to 2. Each staff is staying in own lane |
| Dedicated inspection area created | Having one single point for filing submission and one single staff for reduced the  |  |
| **Mother Nature (Environment)** |  |  |
| Auditorium: event venue | The room was adequate for the event, with abundant room for wall charts, powerpoint presentation, ongoing beverage table and lunch area with kitchen. Signs on doors announced the event with the request for no disturbance. This was one floor from actual process observation, which was helpful | It would be important to have a dedicated space, without interruption, for the event. This will be considered for future events since it was successful for this one. |
| Relocation of death filing clerk | Due to the amount of motion waste, the death clerk was relocated to another area, thus eliminating the constant interruptions and interference. This realization was by the death clerk, with full understanding by the other staff. | Relocation complete and successful. Death clerk is very happy. |
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| **People** |  |  |
| Team composed of process staff and one wild card | Advantages included full knowledge of current processes and full buy-in for future state. Wild card was HR manager, who was able to assist with HR items, as well as offer fresh perspective | For future events, a mix of internal and external resources would be desired. The team was comprised of 5 staff, which was manageable. |
| Facilitators had vested interest in outcome | The event may have been more “pure” if there was no prior relationship between the facilitator and team. There was certain “guidance” by the facilitators during the event, which may have not been present if the relationship did not exist. This was not necessarily a negative observation, since the team endorsed and owned all their future state actions. | The team, having been considered equally during the event, is now back to supervisory/subordinate relationship. But, there is an understanding that there is a team that made decisions on behalf of all and they will be encouraged to continue in this vein. |
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| **- What prevented more progress? (Barriers)** |
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| **REASONS***(What led to results and achievement?)* | **LEARNINGS***(What advice and benefit?)* | **DIRECTIONS***(What actions, Who will do them, When will they be done?)* |
| **Machines (Systems and Equipment)** |  |  |
| POS System and scanner | IT was directed to relocate these items; however there was some initial resistance of unknown origin. After full explanation, IT made the changes as requested. | All actions completed |
| Removal of POS hardware and printer from inspection area | IT was directed to relocate these items; however there was some initial resistance of unknown origin. After full explanation, IT made the changes as requested. | All actions completed |
| Relocation of copier | IT has some angst over the copier not currently being networked, which can occur at a later date if needed. | All necessary actions completed |
| Dedication of one area for death filing inspection | Resistance from process owner due to concerns of potential future need for this space, although the space had not been effectively used until transformed into filing inspection area. | All necessary actions complete. |
| **Methods** |  |  |
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| **Measurement (and Information)**  |  |  |
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