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| **Task**  | **Date of Task** | **Date of SRLD** |
| Increase utilization of the t-drive.  | 2.10-2.14.2014 | 2.18.2014 |
| **Organization** | **Facilitator** | **Participants** |
| Three Rivers District Health Department | April Harris | Georgia Heise, Lindsey Tirey, Greg Ramey, Kim Hudnall, Lil Johnson |

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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?* |
| Zero Files on the T-drive Public Folder | Eliminate/move files | No files remain on T-drive Public Folder | At Expectation |
| Zero Folders on the T-drive Public Folder | Eliminate/move files | No folders remain on T-drive Public Folder | At Expectation |
| Increased Customer Satisfaction | Positive Feedback | Customer Feedback about new structure was well-received | 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)** |  |  |
| Full access and permissions to the t-drive was handled prior to the event.  | Allowed team to be able to work with the t-drive.  | Prior to the event, facilitator should contact subject matter expert (if not participating) and identify any needs the team will require.  |
| Each team member had access to a laptop with the t-drive.  | Allowed team to be able to work on multiple tasks. | Prior to event, facilitator should work with IT to determine which team members need access to a laptop. Also determine what other IT needs may be needed, such as projector, screen, etc.  |
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| **Methods** |  |  |
| Utilizing team members during tools, such as plus/delta | Provide opportunities for all team members to work through tools or processes with the entire team.  | Determine various ways  |
| Daily email to all staff | Provide a brief summary to all staff that reinforced the positive progress with the Kaizen event. |  |
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| **Materials** |  |  |
| Logistics Set-up | Participants had pre-ordered lunches and they were delivered by a staff person. No time was lost due to lunch preparation.  | In the future, continue to pre-order meals.  |
| Conference Room Reserved in Adequate Time | Facilitator had arrange the room prior to the event  | Have everything completed set-up Friday prior to the event.  |
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| **Measurement (and Information)**  |  |  |
| Conducting pre-event survey | Very helpful in gathering information and data from all staff prior to the event. Assisted in formulating cause and effect diagram.  | Facilitator or subject matter expert should collect all existing data or determine data that needs to be collected prior to the event.  |
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| **Mother Nature (Environment)** |  |  |
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| **People** |  |  |
| Two Stakeholder meetings | In-Person updates: coupled with the daily emails, stakeholders had consistent two-way communication with the Kaizen team.  | Continue with mixed methods on communication to ensure all stakeholders are kept up-t0-date and involved with the Kaizen event.  |
| Team dinner on Wednesday evening | Since the team already had working relationships, having the team dinner in the middle of the week allowed for the group to have a social event to break up the week.  | Facilitator should plan a team meal depending on the working relationships of the team members.  |
| Testing random employees | Employees that were not participating on the event team felt involved. Also encouraged  |  |
| Adding personal touch to materials such as agendas | Makes things fun and personable. – add to materials | Take into consideration any holidays or ways to make the materials or events more personable.  |
| Facilitator’s demeanor promoted equality, participation and learning.  | When the facilitator is acclimated to materials and team members, a safe environment was established to promote teamwork.  | Facilitator should make an concerted effort to utilize engaging activities and learning opportunities.  |

| **- 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)** |  |  |
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| **Methods** |  |  |
| Inconsistent Communication | Monday-Wednesday, one person was communicating to all staff re: the event. Thursday and Friday, mixed communication was coming from several team members. One person should have been designated for communication to all staff. | Include in future events, a norm that clarifies who/how we will communicate to staff.  |
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| **Materials** |  |  |
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| **Measurement (and Information)**  |  |  |
| Considerable time spent learning Waste and Value.  | There was wasted time – no pun intended - covering Waste and Value to the extent that the facilitator did.  | Facilitator should cover Waste and Value prior to the event.  |
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| **Mother Nature (Environment)** |  |  |
| No windows in the conference room. (move to reason, contributes to low energy.) | Team had to be on site to have access to t-drive.  | To the extent possible, conduct events that have access to windows. When that is not possible, encourage breaks outside. Try to find rooms with windows and incorporate outside activities.  |
| Not adequate wall space. | Team was limited to on-site conference room due to needing access to the t-drive.  | To the extent possible, conduct events where ample wall space is available.  |
| Facilities | Broken bathroom – two times during the event.  | To the extent possible, conduct events with regular maintenance.  |
| **People** |  |  |
| Facilitator to spend more time preparing Day 1 slides and being aware of low energy: Monday morning, beginning of the process, etc.  | Day 1 slides/content are critical since it is the first exposure to the event.  | Facilitator should have several go-to energy breaks or activities prepared to promote participation |
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