Status, Reason, Learning, Direction – SRLD™

Task	Date of Task	Date of SRLD
Decrease backlog time for low priority GC/CT reports into INEDSS	February 24-28, 2014	March 4, 2014
Organization	**Facilitator**	**Participants**
Chicago Department of Public Health STI Surveillance Program	Kirsti Bocskay	Jeanette Kowalik, Karen Canada, Joanne Davenport, Alison Scott, Karin Hearan, Kingsley Weaver, Sandra Tilmon

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			
Reduce the backlog time of low-priority GC/CT reports from receipt of report to closure in INEDSS	<30 days	Until current backlog is eliminated, backlog time will not be less than 30 days; Sr. DEOs are on target to keep up with incoming work, and potentially backlog could be at 9-12 days;	Above (potentially), Below (if remaining actions are not implemented)
TEAM			
Increase knowledge of kaizen, ability to participate in kaizen, and generate positive interest in doing more kaizen.	Positive team learning survey scores at end of event	107% increase in average question 1 scores All participants scored "very satisfied with event" and "moderate benefit" or "great benefit"	Above
PERSONAL			
Increase ability to lead a kaizen event	Increase personal learning survey "post-post" scores (assessment from training)	Improved in all assessments	At
	Positive facilitation scores from team learning survey	Question 4 scores all 4 and 5	Above
	Positive kaizen leader self-assessment scores	Average score was 6.5	At
	Learnings and useful actions identified on SRLD (below)	Developed good list of do's and don'ts for next event	At

+ What was positive that helped you achieve the results? (Accelerators)		
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)		
Used a projector during the event	Using a projector allows for immediate editing/revisions to maps, development of action	Include a projector as part of all future events. Include in pre-event checklist.

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	plan and presentation with group input.	
Methods		
Tested the solutions during the event	Able to get immediate results/feedback on solutions; energized team	Complete the value stream and sub-process mapping prior to all future events to allow more time to test solutions.
Focus on process (and related wastes)	Focusing on waste helped the team focus on the process and not the people.	Continue to emphasize importance of process (and wastes), not people, in all future events.
Identifying all 8 forms of waste in process.	Stopping waste was recognized to include both people waiting and paper waiting. In this event, paper waiting was a significant waste.	Continue to provide pre-event trainings to team members on value/waste prior to all future events; and during all future events emphasize different types of waste as team moves through process
Materials		
Post-it note system (waste, root cause, solutions)	Getting the data, and working through the root causes behind each waste/issue, allowed for better solution brainstorming and could visualize relationship. Color-code post-it notes all the way through process. Post-it notes also allowed for movement of wastes, root causes and solutions to move through the process (Fishbone to prioritization matrix to ....)	Include a minimum of 3 differently colored post-it notes on pre-event checklist, enough for each team member to have pack of each color.
Measurement (and Information)		
Data was collected before event. Time studies, and lots of measures were collected and analyzed prior to event	Collecting and analyzing baseline data prior to event - makes it easier to understand the process and to capture "after" statistics.	Complete baseline data collection prior to all future events.
Mother Nature (Environment)		
Event was conducted at actual worksite	Ability to pull in staff involved in different steps of process; Could literally walk the process. Consider holding event at work site. (also see negative impacts below)	Weigh value of being onsite to walk the process/call in people for consul to potential interruptions from being onsite carefully prior to all future events.
People		
Met with program leadership prior to event	Allowed team members to see that management was supportive of process and solution to "problem" in their hands.	Include leadership/management in at least one Kaizen prep meeting
Built trust with team members and engaged them in developing solutions.	The kaizen process engages the people who do the work in developing improvements. This has a	For all future events, try to identify potential change management issues during event prep, follow the

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	significant change management impact and helps develop positive energy. Do not under-estimate the softer people issues as critical to event success.	kaizen process, and maintain equal focus on the process and the people.

- What prevented more progress? (Barriers)		
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)		
No access to printer during event	It is helpful to print out documents/materials during event	As part of event prep, ensure printer is nearby to work room, and all persons have been mapped to printer who are working from laptops
No access to Wifi or DSL line during event. Only one person had remote access to server (hot spot).	It is helpful to have internet access during event to access needed information and documents, and to share with others.	As part of event prep, ensure work room is wifi-enabled or DSL port available
Methods		
A lot of time was spent ordering food, organizing food, etc.	Would have been easier to have people get their own lunch or order a few items from one place and people have to make do/be less picky or have everyone pre-select their food the week before the event.	Order from one place daily with several options instead of whole menu, or let people on their own for lunch
Materials		
Used wall paper on roll; no flip charts	Using the paper on the roll requires periodically having to stop to cut paper to put up on the wall; hard to hang up, needed 2 people to tape up.	Add to pre-event checklist: Pre-cut many sheets of paper beforehand or use pre-cut paper with sticky back (e.g., huge post-it notes).
Measurement (and Information)		
Unable to measure complete process during event, cycle time is greater than 1 week	When the overall cycle time of the target process is greater than a day, it becomes difficult to measure during a 1 week event. In these cases it is important to select sub-measures which can be measured during the event in order to test potential solutions.	Include in the action plan tasks to measure and verify the improvement results, and follow-up with the process owner to ensure they are done.
Mother Nature (Environment)		
Polar vortex	Had to postpone January event due to school closures and staff calling out	Schedule events when weather is less of an issue
Team members were distracted by staff walking by,	Have closed door on work room, or communicate to	Ensure event takes place in location where work

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and team members were interrupted.	all staff the importance of not interrupting, and post a sign not to interrupt unless critical.	room has door, or communicate to staff in area prior to event the importance of not interrupting. Post signs outside event area.
Team members kept disappearing to their work space. Event room close to actual work space.	Consider moving event to offsite location. (see positive impacts above). Also, holding team members more accountable to norms, instead of waiting until end of day/beginning of next day to rate team on success with norms.	Weigh value of being onsite to walk the process/call in people for consul to potential interruptions from being onsite carefully prior to all future events. During all future events, hold team more accountable to norms.
People		
Team members were called out of event. Several team members had meetings/schedule conflicts that prevented them from participating 100%.	Emphasize importance with management that team members need to be present during all 5 days, and not allow persons who can't be 100% present to be on team. Part-time participants slowed the process down by having to explain what had already happened/been discussed, or suggesting ideas/thoughts that had already been discussed by team.	Determine when preparing for an event who/when/how to bring in as a part-time participant, and communicate clear expectations to them.
Greater participation from team members who weren't part of the actual process than from those who were, at times dominated the discussion.	Facilitator(s) need to re-direct conversation/discussion to those persons involved in process so have time to get their perspective/ideas.	Build a repertoire of techniques to tone down dominators and draw out non-participators in future events.