



# San Francisco Fellows Project: **Designing a Visual Board for Nursing Huddles**

July 10, 2018

# Background

## San Francisco Fellows Program

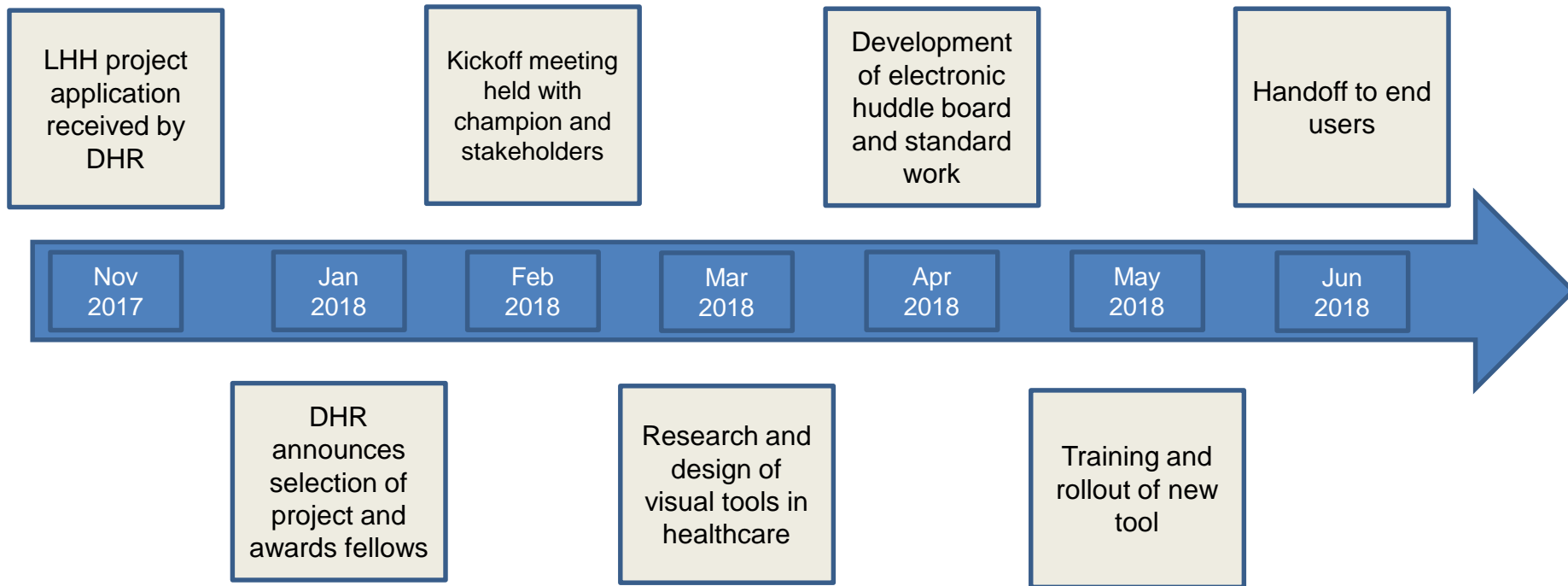


San Francisco Fellows are a cohort of recent graduates who are pursuing leadership careers in a public, city-government setting

Fellows are placed as full-time employees with participating city departments and have the option of pursuing a supplemental project for up to 40 hours (Laguna Honda projects have been chosen 2 consecutive years)

# Project Timeline and Goals

Goal: To develop a visual communication board to foster problem solving amongst clinical, operations and administrative teams



# Project Process

Laguna Honda's proposal was selected by three fellows

- Ariel Bolingbroke: Rec & Park
- Monica Casanova: Public Utilities Commission
- Emily Vontsolos: Controller's Office

To complete the project within the 40 hours timeframe, work was divided into four categories

- Education and overview with project champion: 2 hours
- Interview with stakeholders: 8 hours
- Design and development of electronic huddle board: 20 hours
- Training and implementation: 10 hours

# Project Challenges

After interviewing with key stakeholders in the clinical, operations and administrative teams, the fellows identified the major challenges:

- Time limitations: the 40 hours were not consecutive but divided up in bi-weekly half day sessions
- Organizational structure: operations and administrative teams did not have pre-existing leadership huddles, nor did a visual board sound useful to stakeholders
- Lean experience: clinical (nursing) leaders had significantly more practice using visual tools and standard work for huddling

# Redefining Scope

The team narrowed the scope to overcome the discovered challenges

*Old goal:* To develop a visual communication board to foster problem solving amongst clinical, operations and administrative teams

*New goal:* To design a visual communication board that displays information for the daily nursing director huddle

# Project Deliverables

- An electronic visual tool that displays **patient flow, staffing, medical report, and quality of care** metrics that are of “need to know” for nursing leadership on a daily basis
  - This tool will help to:
    - Aggregate data to analyze trends over time
    - Compare data between neighborhoods
    - Ensure discussion during the huddle remains on topic
- The standard work describes how to use the tool and how to make adjustments in the future as new needs arise
  - For example, conditional formatting could be used to identify poor performance requiring immediate attention

# Huddle Board in Action

Follows current flow of daily nursing director huddle and empowers all participants to contribute

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1		Waitlist:	ZSFG:															
2		Patient Flow							Staffing					Medical Report		Quality of Care- TBD		
3	Neighborhoods	Census Current	Admissions Upcoming	Discharges Upcoming	Relocations:		Bed Holds Current	Vacant Beds Current	Outings Upcoming	Coaches Current	Team Nursing Current	Shortages			Change In Condition Past 24 Hours	Falls Past 24 Hours	Elopements Past 24 Hours	Other UO Past 24 Hours
4					From Upcoming	To Upcoming						Licenses Current	PCA/CNA Current	HHA Current				
5																		
6	NM																	
7	N1																	
8	N2																	
9	N3																	
10	N4																	
11	N5																	
12	N6																	
13	S2																	
14	S3																	
15	S4																	
16	S5																	
17	S6																	
18	PMA																	
19	PMS																	
20	LHH	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
21																		
22																		
23																		
24	Step 1:	Fill in Waitlist Numbers in Cell C1 and E1																
25	Step 2:	Fill in Patient Flow Numbers for all Neighborhoods																
26	Step 3:	Fill in Staffing Numbers for all Neighborhoods																
27	Step 4:	Fill in Medical Report Numbers for all Neighborhoods																
28	Step 5:	Fill in Quality of Care Numbers for all Neighborhoods																
29																		



# Team Celebration



Emily  
Vontsolos

Monica  
Casanova

Ariel  
Bolingbroke

# Next Steps

Susan Duong, Nursing Director, is championing the new tool in daily nursing director huddles

Nursing Directors will adjust the visual board and standard work as they determine the most important metrics

Laguna Honda will become a part of the 2018-2019 San Francisco Fellows Program and host a fellow for one year

# Questions and Comments



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