Fostering Daily Readiness, Care Coordination, & Problem Solving Accountability – The Daily Operation Briefing

Anne Dykes, RN, MSN, ACNS-BC
Katie Basta, RN, BSN
Named one of the nation’s top children’s hospitals

- 10 ranked sub-specialties in all eligible U.S. News & World Report categories
- $60 million invested in research initiatives yearly
- Over 30,000 annual admissions
- More than 25,000 surgeries per year

Opened in 1954

- 538 beds
- 1 academic partner: Baylor College of Medicine
- 2,000 faculty, residents and fellows

More than 115,000 emergency visits per year to our Level 1 Trauma Center

- Over 1,500 critical patient transports per year
- 40 pediatric sub-specialties
- More than 7,000 employees

Texas Children’s mission is to create a healthier future for children and women throughout our global community by leading in patient care, education and research.

texascildrens.org
Agenda

- Background
- Building your DOB Process
- Data
- Conclusions
- Q&A
Background

• Daily Management Systems
  • High reliability organizations
  • Lean methodology
  • Huddles
Creating a Lean Culture

“A company’s culture is a result of its management system. Culture is crucial, and to change it, you have to change your management system.”

-David Mann

• Leaders’ behavior
• Specific expectations
• Tools
• Routine practices
Managing Health Care Delivery

- Size of quaternary pediatric healthcare organizations
- Health Information Technology/EMR
  - Decreased interpersonal interactions

More reliable, intentional approach
Daily Operational Briefing

• Provide reliable and safe care today
• Identify problems quickly
• Create and escalate counter-measures efficiently
Evolution of Daily Operational Briefing

**October 1, 2012**
Monday-Friday @ 10:30am  
Location: Non-clinical area, Quality & Safety Department  
Host: 1  
Barriers: lack of attendance & accountability  
Manual pen and paper process

**November 1, 2012**
DOB expanded to 7 days per week & holidays  
Start time changed for weekend & holidays, 9:30am  
Host: expanded to include Chief Quality & Safety Officers  
Barriers: lack of attendance & accountability  
Manual pen and paper process

**November 1, 2015**
Location: Moved closer to clinical area  
Hosts: expanded to include executive leadership  
In person attendance encouraged  
Teleconferencing for remote sites  
Accountability  
Technology utilized
Daily Operational Briefing: An Intentional Approach

- **TCP**
- **Urgent Care**
- **Health Centers**
- **Pavilion for Women**
- **West Campus**
- **Woodlands**

**Clinical Support Services**
- Supply Chain
- Information Technology
- Laboratory
- Facilities
- Radiology
- Pharmacy
- Respiratory
- Family Advocacy
- Security Services

**Real Time Demand Capacity**
- Emergency Huddle
- Critical Care Huddle
- Outpatient Huddle
- Acute Care Unit Huddles
- Peri-Operative Huddle
- West Campus Huddle
- Woodlands Huddle

**Daily Operational Briefing**
Framework

- Quality & Safety Metrics
- Volume & Staffing Assessment
- Readiness Assessment
- Quick Hits
- Debrief
- Complex Issues
Welcome
to the
Daily Operational Briefing
### Review of Quality & Safety Metrics

<table>
<thead>
<tr>
<th>Infection Related HACs Reported</th>
<th>FY17 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLABSI</td>
<td></td>
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<tr>
<td>CAUTI</td>
<td></td>
</tr>
<tr>
<td>SSI-Pedi</td>
<td></td>
</tr>
<tr>
<td>SSI-C/S</td>
<td></td>
</tr>
<tr>
<td>VAP</td>
<td></td>
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<tr>
<td><strong>TOTAL # OF IC-HAC</strong></td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Non-Infection Related HACs Reported</th>
<th>FY17 Total</th>
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</thead>
<tbody>
<tr>
<td>ADE</td>
<td></td>
</tr>
<tr>
<td>HAPI</td>
<td></td>
</tr>
<tr>
<td>Falls</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL # OF Non-IC-HAC</strong></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL HARM EVENTS FY17**
Volume & Staffing Assessment

- Inpatient volumes – 3 locations

- Inpatient volumes are populated by the Real Time Demand Capacity process (RTDC)

- Census Alerts

- Focus of the volumes & staffing assessment is placed on the negative operational variance

- Other parameters displayed:
  - Watcher’s List
  - Bed holds related to placement with protective services
  - Bed holds related to psychiatric transfer
  - Admitted children requiring sitters
### Volume & Staffing Assessment

#### EMERGENCY DEPARTMENT

<table>
<thead>
<tr>
<th></th>
<th>1/8/2017</th>
<th>PATIENT ARRIVALS LAST 24 HOURS</th>
<th># OF ADMISSIONS</th>
<th>LWBS</th>
<th>LWBS %</th>
<th># BOARDERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAIN CAMPUS</td>
<td></td>
<td></td>
<td>229</td>
<td>40</td>
<td>2</td>
<td>0.9%</td>
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<tr>
<td>WEST CAMPUS</td>
<td></td>
<td></td>
<td>151</td>
<td>9</td>
<td>1</td>
<td>0.8%</td>
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</table>

#### URGENT CARE

<table>
<thead>
<tr>
<th></th>
<th>VISITS YESTERDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAIN</td>
<td>67</td>
</tr>
<tr>
<td>MAIN SELF SELECT</td>
<td>30</td>
</tr>
<tr>
<td>COMMUNITY</td>
<td>181</td>
</tr>
</tbody>
</table>

#### PERIOPERATIVE

<table>
<thead>
<tr>
<th></th>
<th>SCHEDULED TODAY</th>
<th># ADD-ONS</th>
<th># CANCELLATIONS DUE TO CAPACITY (previous 24hr)</th>
<th>HELD IN PACU OVERNIGHT (previous 24hrs)</th>
<th>SRU</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAIN CAMPUS</td>
<td>77</td>
<td>7</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>WEST CAMPUS</td>
<td>5</td>
<td>2</td>
<td>0</td>
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<td>0</td>
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<td>PAVILION</td>
<td>4</td>
<td>0</td>
<td>0</td>
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<td>0</td>
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#### OUTPATIENT

<table>
<thead>
<tr>
<th></th>
<th>SCHEDULED TODAY (MD &amp; D3T)</th>
</tr>
</thead>
<tbody>
<tr>
<td>MEDICAL CENTER &amp; HEALTH CENTER</td>
<td>3,156</td>
</tr>
<tr>
<td>WEST CAMPUS</td>
<td>718</td>
</tr>
<tr>
<td>PW OUTPATIENT</td>
<td>902</td>
</tr>
<tr>
<td>WOODLANDS</td>
<td>444</td>
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</table>

#### TCP

<table>
<thead>
<tr>
<th></th>
<th>Previous Day Encounters</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Locations</td>
<td></td>
</tr>
<tr>
<td>The Center for Children and Women</td>
<td>Previous Day Encounters</td>
</tr>
<tr>
<td>Pedi</td>
<td>129</td>
</tr>
<tr>
<td>Maternity</td>
<td>70</td>
</tr>
<tr>
<td>Ancillary</td>
<td>23</td>
</tr>
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Readiness Assessment

S-E-S-S-F-I-M

Methods
Facilities
Information Services
Supplies
Satisfaction
Equipment
Safety
Readiness Assessment

Safety
- Patient safety concerns?
- Safety Scoops of significance?
- IMT, RRT, Codes or Cardiopulmonary Arrest of concern / did not go well?
- Employee safety trends or events?
- Other safety concerns?

Equipment
- Does anybody have any equipment needs
  - Any new items from Biomed?

Supplies
- Does anybody have any supply needs?
  - Any new items from Supply Chain?
Readiness Assessment

Satisfaction
- Significant patient or family satisfaction events?
- Transfer denials

Facilities
- Does anybody have any facility needs?
- Any new items from Facilities?
- Any new items from Security?

Information Services
- Does anybody have any IS need?
- Any new items from IS?

Methods
- Support issues- pharmacy, laboratory, respiratory, dialysis/pheresis or imaging issues?
- Any other issues that anyone would like to bring up?
# Problem Accountability – Quick Hits

<table>
<thead>
<tr>
<th>Open</th>
<th>ISSUE</th>
<th>SOLUTION OWNER</th>
<th>REPORT BACK DATE</th>
<th>CONTRIBUTING FACTORS</th>
<th>DATE REPORTED</th>
<th>PRIMARY STAKEHOLDER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Sitter safety concerns with psych patients in EC</td>
<td>Karen Lettre</td>
<td>11/1/2016</td>
<td>Work Environmental</td>
<td>10/29/2016</td>
<td>Emergency Department</td>
</tr>
<tr>
<td>Open</td>
<td>Eye hook at Kingwood</td>
<td>Dennis Ford</td>
<td>11/1/2016</td>
<td>Work Environmental</td>
<td>10/31/2016</td>
<td>Outpatient/Ambulatory</td>
</tr>
<tr>
<td>Open</td>
<td>Patients running towards garage through automatic sliding glass doors - Woodlands</td>
<td>Dennis Ford</td>
<td>11/1/2016</td>
<td>Work Environmental</td>
<td>10/31/2016</td>
<td>Facility Ops/Security</td>
</tr>
<tr>
<td>Open</td>
<td>PFW 1122 Shower</td>
<td>Dennis Ford</td>
<td>11/1/2016</td>
<td>Work Environmental</td>
<td>10/31/2016</td>
<td>Women's Specialty Unit</td>
</tr>
<tr>
<td>Open</td>
<td>FC elevator #7</td>
<td>Ken Javier</td>
<td>11/2/2016</td>
<td>Work Environmental</td>
<td>10/5/2016</td>
<td>Facility Ops/Security</td>
</tr>
<tr>
<td>Open</td>
<td>Nurse Call Downtime (WT 10, 15, 16, Aber 5N) 11/2/2016</td>
<td>Leanne O'Brian</td>
<td>11/3/2016</td>
<td>Work Environmental</td>
<td>10/31/2016</td>
<td>Acute Care</td>
</tr>
<tr>
<td>Open</td>
<td>PW 7 clean room did not pass</td>
<td>Yemi Abudu</td>
<td>11/12/2016</td>
<td>Work Environmental</td>
<td>9/30/2016</td>
<td>Pharmacy</td>
</tr>
</tbody>
</table>
Debrief Categorizing / Assigning Newly Defined Issues
Quick Hits

- Resolution for a quick hit is less than 2 weeks
- Does not require high level problem analysis
- Does not require project management
- A quick hit that does not get resolved will get re-defined as a complex issue
Quick Hits: Documentation

- Open/Closed
- Brief description of problem or issue
- Solution owner
- Significant dates:
  - Report back date
  - Date reported
- Primary Stakeholder – location or department affected by the issue
- Contributing factors

<table>
<thead>
<tr>
<th>Open</th>
<th>Issue</th>
<th>Solution Owner</th>
<th>Report Back Date</th>
<th>Contributing Factors</th>
<th>Date Reported</th>
<th>Primary Stakeholder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Star safety concerns with 2016 version of ECC</td>
<td>Karen Battre</td>
<td>11/1/2016</td>
<td>Work Environmental</td>
<td>12/28/2016</td>
<td>Emergency Department</td>
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<tr>
<td>Open</td>
<td>Best hook at Kingswood</td>
<td>Dennis Ford</td>
<td>11/1/2016</td>
<td>Work Environmental</td>
<td>12/31/2016</td>
<td>Outpatients/Intubation</td>
</tr>
<tr>
<td>Open</td>
<td>Patients running towards garage through automatic sliding glass doors - Woodlands</td>
<td>Dennis Ford</td>
<td>11/1/2016</td>
<td>Work Environmental</td>
<td>12/31/2016</td>
<td>Facility Ops/Security</td>
</tr>
<tr>
<td>Open</td>
<td>PHS 122 Shower</td>
<td>Dennis Ford</td>
<td>11/1/2016</td>
<td>Work Environmental</td>
<td>12/31/2016</td>
<td>Women's Specialty Unit</td>
</tr>
<tr>
<td>Open</td>
<td>PCalevander #1</td>
<td>Ken Jakob</td>
<td>11/2/2016</td>
<td>Work Environmental</td>
<td>12/31/2016</td>
<td>Facility Ops/Security</td>
</tr>
<tr>
<td>Open</td>
<td>Nurse Call Downtime (W11, 10, 15, 14) April 2016</td>
<td>Leanne O'Brien</td>
<td>11/1/2016</td>
<td>Work Environmental</td>
<td>12/31/2016</td>
<td>Acute Care</td>
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<tr>
<td>Open</td>
<td>PW1 elevator room did not pass</td>
<td>Yani Albulu</td>
<td>11/12/2016</td>
<td>Work Environmental</td>
<td>9/30/2016</td>
<td>Pharmacy</td>
</tr>
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</table>
Contributing Factors

Coordination of Care

<table>
<thead>
<tr>
<th>Factor Types</th>
<th>Contributory Influencing Factor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Factors</td>
<td>Condition (complexity &amp; seriousness)</td>
</tr>
<tr>
<td></td>
<td>Language and communication</td>
</tr>
<tr>
<td></td>
<td>Personality and social factors</td>
</tr>
<tr>
<td>Task and Technology Factors</td>
<td>Task design and clarity of structure</td>
</tr>
<tr>
<td></td>
<td>Availability and use of protocols</td>
</tr>
<tr>
<td></td>
<td>Availability and accuracy of test results</td>
</tr>
<tr>
<td></td>
<td>Decision-making aids</td>
</tr>
<tr>
<td>Individual (staff) Factors</td>
<td>Knowledge and skills</td>
</tr>
<tr>
<td></td>
<td>Competence</td>
</tr>
<tr>
<td></td>
<td>Physical and mental health</td>
</tr>
<tr>
<td>Team Factors</td>
<td>Verbal communication</td>
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<tr>
<td></td>
<td>Written communication</td>
</tr>
<tr>
<td></td>
<td>Supervision and seeking help</td>
</tr>
<tr>
<td></td>
<td>Team structure (congruence, consistency, leadership, etc.)</td>
</tr>
<tr>
<td>Work Environmental Factors</td>
<td>Staffing levels and skills matrix</td>
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<tr>
<td></td>
<td>Workload and shift patterns</td>
</tr>
<tr>
<td></td>
<td>Design, availability &amp; maintenance of equipment</td>
</tr>
<tr>
<td></td>
<td>Administrative and managerial support</td>
</tr>
<tr>
<td></td>
<td>Environment</td>
</tr>
<tr>
<td></td>
<td>Physical</td>
</tr>
<tr>
<td>Organizational &amp; Management</td>
<td>Financial resources &amp; constraints</td>
</tr>
<tr>
<td>Factors</td>
<td>Organizational structure</td>
</tr>
<tr>
<td></td>
<td>Policy, standards, and goals</td>
</tr>
<tr>
<td></td>
<td>Safety culture and priorities</td>
</tr>
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</table>
## Complex Issues

| Status | Issue                                                                 | Owner                          | Date Reported | Last WTW Presentation | Report Back Date | Days to Resolution | Executive Sponsor | Quality Leaders     | Quality Coach       | Present to PC3 Date | Responsible Area                  | Campus/Location |
|--------|-----------------------------------------------------------------------|--------------------------------|---------------|-----------------------|------------------|-------------------|-------------------|---------------------------|---------------------|---------------------|---------------------|----------------------------------|-----------------|
| Open   | Radiology-Pharmacy compounding contract                               | Alex Koroll                    | 9/9/2016      | 9/22/2016             | 11/8/2016        | 60                | Mallory Caldwell    | Lane Donnelly           | Tiffany Wrenn         |                     | Radiology            | Systemwide       |
| Open   | Crash cart security                                                   | Lee Evey/Rick McFeet           | 10/10/2016    | 11/8/2016             |                  | 29                | Tabitha Rice         | Joan Shook               | Eunice Ambroz         |                     | Systemwide                      | Systemwide       |
| Open   | Patient identification/ Mislabeled Lab Specimens                      | Heather Cherry                 | 2/22/2016     | 7/26/2016             | 11/22/2016       | 274               | John Nickens         | Joan Shook               | Anne Dykes            |                     | Systemwide                      | Systemwide       |
| Open   | NICU 4 - Code paging system; end of life cycle                        | Ron Rabii/ Heather Cherry      | 3/30/2016     | 8/23/2016             | 11/22/2016       | 237               | Judy Swanson         | Eric Williams            | Susan Greenberg       |                     | Critical Care/Special Care    | Main Campus     |
| Open   | NICU Wi-Fi connectivity issues                                        | Mary Lawrence                  | 9/29/2016     | 12/15/2010            |                  | 75                | John Henderson       | Joan Shook               | Joyce Ramsey-coleman  |                     | Information Services   | Main Campus     |
| Open   | Staff Safety/ Security                                               | Mike Hogan/ Roxanne Vara       | 3/24/2016     | 9/13/2016             | 1/11/2017        | 293               | Bert Gumeringer/ Gail Parazynski | Joan Shook               | Tiffany Wrenn         |                     | Emergency Department | Main Campus     |
Complex Issues: Making the Call

- Estimated time to problem resolution
- Need for high level project management
- Need for consensus building between multiple groups/departments
- Recurrences of similar events
Complex Issues: Documentation

- Brief description of the problem/issue…a name
- Significant dates
  - Date of event? Days to problem resolution? Report out dates?
- Person specific role assignments
- Responsible area
- Location affected by solution
Complex Issues: Team Roles

- Owner
  - Identifies the right team members
- Executive Sponsor
  - Escalates barriers to Quality Leader or Executive Sponsor
- Quality Leader
- Quality Coach
- Team Members
  - Presents updates to the executive leadership group
Complex Issues: Team Roles

- Owner
- Executive Sponsor: Attends Walk the Wall
- Quality Leader: Removes barriers
- Quality Coach: Provides input on timeline & scope
- Team Members
Complex Issues: Team Roles

- Owner
- Executive Sponsor
  - Provides any pertinent history
- Quality Leader
  - Provides improvement methodology guidance
- Quality Coach
  - May remove barriers
- Team Members
Complex Issues: Team Roles

- Owner
  - Provide project management assistance as needed
- Executive Sponsor
  - Schedule meetings, prepare agendas
- Quality Leader
- Quality Coach
  - Reviews & posts Complex Issue Template & Presentation Slide
- Team Members
Complex Issues: Team Roles

- Owner
- Executive Sponsor
- Quality Leader
- Quality Coach
- Team Members

Subject matter experts
Operationalize interventions
Complex Issues: Tools

- Complex Issue Project Template
- Define the problem
- Collect baseline data and measuring current state
- Analyze
- Implementation & communication plan
- Control/Sustain
Complex Issue:

Title of Complex Issue

PROBLEM DEFINITION / ANALYSIS / BASELINE DATA & BACKGROUND

IMPLEMENTATION / COMMUNICATION PLAN / CONTROL & SUSTAIN

SYSTEM-WIDE STANDARDIZATION/SPREAD

How will you ensure the solution will be applied to every location? What steps did you take?

☑ Main Campus
☑ West Campus
☑ PFW
☑ Woodlands
☑ Outpatient
☑ System-wide

TIMELINE

Target Completion Date:

Milestone Dates:

Validation by Owner

Validation by Quality Coach

Completion Date
Complex Issues Example

- Safety Concern Identified at the DOB
  - Autistic patient on acute care with escalating behavior
  - No clear course of action to manage this patient subset
  - Patients at risk for harm
  - Early warning sign (we got lucky)
Caring for the Behavioral Health Patient


Interventions:

- Quantify behavioral health in-patient patient days
- Draft Policy/procedure for in-patient management of behavioral health patient
- EPIC Screening tool upon admission
- Development of a response team (*9999 acute and long-term management) – House Supervisor, Security, Child Life/Social Work
- Training of response team and general training of team activation

Barriers: N/A

Completion date: 12/31/16

Walk-the-Wall

- Every other Tuesday – 9:30 AM
- Updates from ~ 4 Complex Issues
- Executive Vice Presidents + administrative leaders
Host Role

- Open & MC meeting
- Leads post-meeting debrief
- Keeps time
- Redirects verbose reporting
- Welcomes all reporting
Daily Operation Briefing Aim

- Rapidly identify and escalate problems
- Problem Resolution Accountability
- Improved coordination
- Team-building
Results

Data Summary for 1 Year of Revised Daily Briefing
Quick Hits

N = 1108

92 / month

Time to resolution:
• Mean 3.38 days
• Range 0-60 days

Complex Issues

N = 53

4.41 / month

Time to resolution
• Mean 102.48 days
• Range 18-323 days
Quick Hits – Trend / Month
Complex Issues – Trend / Month

Raw number of Complex Issues

UCL

1/1/15 2/1/15 3/1/15 4/1/15 5/1/15 6/1/15 7/1/15 8/1/15 9/1/15 10/1/16

LCL
Initial Conclusions

• Improvement Observations
  • Successful framework to identify a large number of issues
  • Tracking of solutions to completion
  • Positive effect on organizational coordination
  • Ongoing improvement leads to less issues
Critical to Success

- Leadership Engagement
- Spread Strategy
- Technology
- Risk and Legal Partnership
Questions & Comments