

The Nurse Manager's Guide to **Improving Unit Outcomes**

Focus on the opportunities that will deliver meaningful impact

Look here to

- Prioritize among competing priorities
- Target opportunities for meaningful improvement
- Involve staff in driving unit performance

Nursing Executive Center

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Executive Summary

Unit-Level Outcomes Critical to Organizational Success

Whether you're a new manager or tenured in your role, chances are you've felt overwhelmed at least once in the last six months. If so, you're not alone. Health care organizations are increasingly under pressure to improve care quality, and executives are asking unit leaders to achieve strong performance on a growing number of metrics.

The challenge is: most unit leaders face an overwhelming number of metrics. And when confronted with so many competing priorities, it can be hard to know where to start and hard to avoid spreading yourself (and your staff) too thinly.

Five Tools to Help You Achieve Meaningful Impact

These five tools will help you narrow your list of critical unit priorities to a manageable number, identify the biggest opportunities for improvement, and communicate them to your staff. Ultimately, this toolkit aims to help you focus your time and energy on a limited number of activities that will have the greatest impact on your unit's performance.

How to Use This Toolkit

While these tools are designed to be used in order, they can also be used individually. To decide which tool will best help you improve your unit's outcomes, read the brief tool descriptions on page 3.

Isolate Staff Members' Best Ideas

What This Tool Helps You Do

This tool helps you hone in on staff members' strongest ideas while engaging staff in unit improvement.

When to Use This Tool

We recommend all nurse managers use this tool to engage staff in unit improvement.

Tool Profile

This tool consists of:

- Idea Board Template and instructions for transparently prioritizing and tracking staff members' ideas
- New Idea Form
- Idea Triage Cheat Sheet
- Facilitator Guide (for an initial training session to introduce the Idea Board to staff)

Time Required

To get started:

- 30 minutes for material prep
- 30 minutes to introduce the Idea Board to staff (one time for each shift)

On an ongoing basis:

- 5 to 10 minutes for discussion at change-of-shift or unit huddle

▶ Access this tool: advisory.com/nec/unitoutcomes

Directions for Nurse Managers

Follow these steps to implement an Idea Board on your unit.

Step 1. Create an Idea Board.

1. **Hand-draw** a 2x2 grid on a whiteboard in your daily huddle area. Use the template on page 32 as a guide. Make sure you draw the grid big enough for one envelope to easily fit in each quadrant.
2. **Tape** one envelope into each quadrant of the whiteboard. Each envelope should be big enough to store 8.5"x11" pieces of paper. (Make sure the envelopes don't cover the words in each quadrant, or write the corresponding quadrant label on each envelope.)
3. **Tape** an envelope big enough to store 8.5"x11" pieces of paper on or below your whiteboard. Label it: New Ideas.
4. **[Optional] Write** your unit's top three priorities at the bottom of the whiteboard. You'll later use these as prompts for staff ideas. If you have trouble deciding on only three priorities, pick the ones where you particularly want staff buy-in or new ideas.

If your staff are very familiar with unit goals, or if unit goals are posted in another location (for example, if you're already using Tool 3: Communicate Unit Priorities to Staff), you don't need this step.

Step 2. Prepare to lead a training session on the Idea Board.

1. **Print** the New Idea Form on page 33 and Idea Triage Cheat Sheet on page 34. You'll need one copy of each per staff member, plus two extra. You can also find each of these handouts at advisory.com/nec/unitoutcomes.
2. **Fill out** the New Idea Form for two sample ideas. You'll want to create an "Implement" and a "Do Not Pursue" example. Use the examples on pages 35 and 36, or use the Idea Triage Cheat Sheet on page 34 to create your own examples.

Step 3. Introduce the Idea Board to your staff in a quick training session.

1. **Use** the Facilitator Guide on page 37.

Step 4. Once a week, take five minutes to prioritize new ideas with staff at change of shift.

These steps are a high-level overview of how to triage ideas in the moment. For more information on triaging ideas, review the Idea Triage Cheat Sheet on page 34.

1. **Review** any New Idea Forms from the New Ideas envelope as a group. You'll want to ensure staff understand the new idea so they can easily triage it.
2. **Decide** if the idea supports your unit's top three priorities. If an idea does not align with your unit's priorities, explain that this idea can still move forward but other ideas may take priority.
3. **Decide** each new idea's impact and complexity. Use the Idea Triage Cheat Sheet on page 34 as a guide. Then place the new idea in the appropriate Idea Board quadrant.
4. **Decide** if you want to begin immediately working on an idea that is sorted into the "Implement" quadrant. Base this decision on how many projects are already underway and how much time your staff has.
5. **Ask** for volunteers to "own" each new idea that the group decides they want to immediately work on.

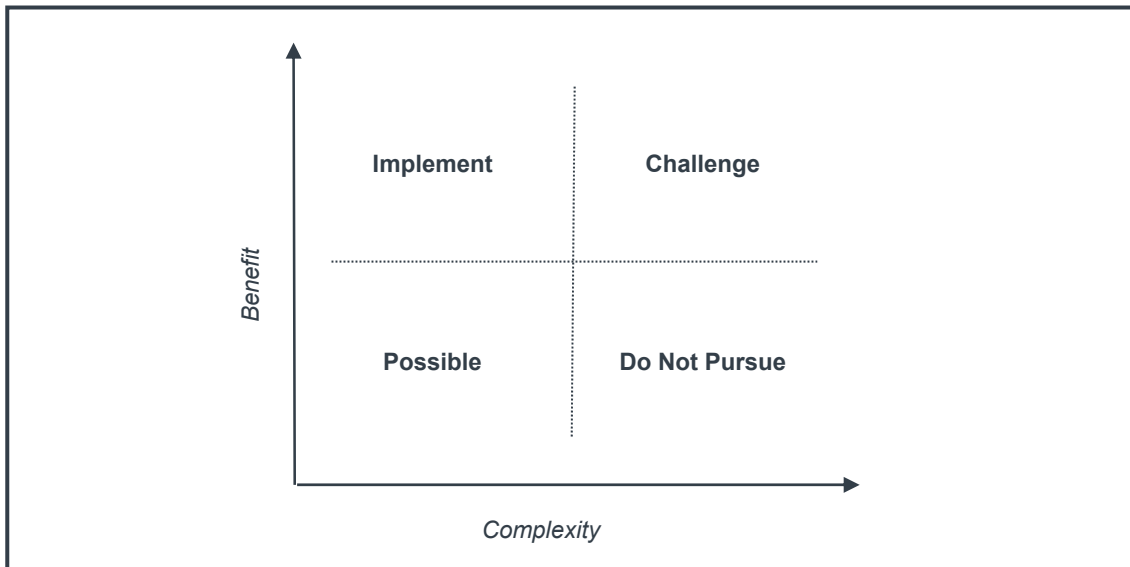
Step 5. At each change of shift, take five minutes to discuss current projects.

1. **Review** all ideas that are currently underway.
2. **Acknowledge** any completed ideas and remove them from the board. Keep a record of these completed ideas.

How to Draw an Idea Board

Use this template to draw your own Idea Board. Make sure you draw the grid big enough for an 8.5"x11" piece of paper to easily fit in each quadrant.

Idea Board



Optional Additions to Your Idea Board

Unit Priorities	Things We're Working On
1 _____	1 _____
2 _____	2 _____
3 _____	3 _____
4 _____	4 _____

New Idea Form

Name _____ Date _____

Describe the problem.

Why is it happening?

How can we fix it?

Idea Triage Cheat Sheet

This cheat sheet will help you triage new ideas in two easy steps.

Step 1. Answer these questions to decide if the idea is complex and if it will benefit your unit.

How complex is this idea to do?

- Yes No Will it require a lot of time?
- Yes No Will it require a lot of resources?
- Yes No Will it require a lot of stakeholders?
- Yes No Will it require organizational approval?

How many times did you answer "yes"?

0-1 times Low complexity
2-3 times Medium complexity
4 times High complexity

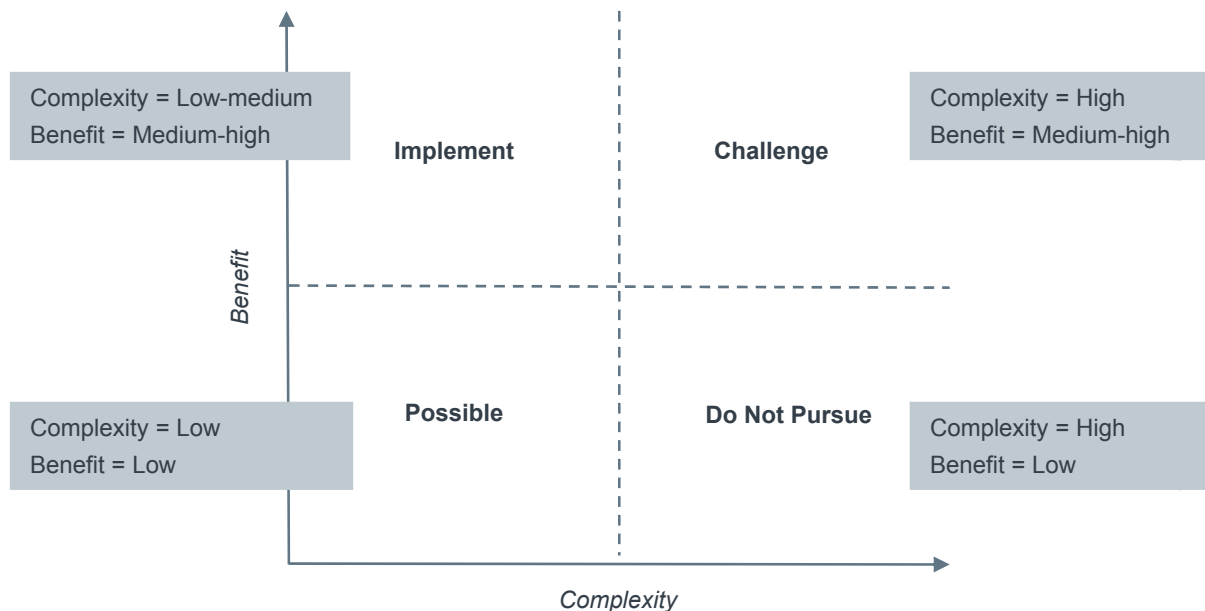
How will this idea benefit your unit?

- Yes No Does it align with unit priorities?
- Yes No Will it save time?
- Yes No Will it improve quality or safety?
- Yes No Will it engage staff?
- Yes No Will it enhance patients' experience?

How many times did you answer "yes"?

0-1 times Low benefit
2-3 times Medium benefit
4+ times High benefit

Step 2. Use your answers to the questions above to sort the idea into the appropriate category.



Source: Nursing Executive Center research.

New Idea Form: Example 1

This idea should go in the "Do Not Pursue" category.

Describe the problem.

Patients and family members complain that parking is difficult to find or far away.

Why is it happening?

Parking Structure B was torn down to make room for an outpatient clinic. Now there is a parking shortage.

How can we fix it?

Build a new parking structure.

New Idea Form: Example 2

This idea should go in the "Implement" category.

Describe the problem.

A patient almost fell while trying to reach her book on the bedside table.

Why is it happening?

The patient's husband set her book on the far side of the table. The patient is petite and couldn't reach her book. For this patient, the bedside table needs to be closer to the bed.

How can we fix it?

Add a reminder to the whiteboard to check and adjust the bedside table for all fall risks.

Facilitator Guide for an Initial Training Session

This guide will help you introduce the Idea Board and triage process to your staff. Use the directions and scripting to lead a 30-minute training session with staff. We recommend one training per shift.

1. Introduction: 5 minutes

Goal: Ensure participants understand the purpose and goals of the training.

- a. Tell participants why they are in a training.
 - *I brought you all together today to talk about how we can continue to improve our unit's performance. Some of our best ideas come from you. But sometimes it's hard to give you feedback and actionable next steps because we're all so busy.*
 - *To help, we're going to have a more structured way to collect, prioritize, and track new ideas. It's called an "Idea Board" and it will help ensure good ideas aren't lost, and that we follow through on projects. It will also help us spend our limited time on projects that we can accomplish and that will have the greatest positive impact.*
- b. Share the goals for the training.
 - *I have two goals for today's training. First, I'll introduce you to the idea behind an Idea Board and how it will help us quickly solve problems.*
 - *Second, I'll explain how our unit will use the Idea Board during our daily huddles.*

2. Introduce the Idea Board: 10 minutes

Goal: Describe how the Idea Board and triage process works.

- a. Introduce the Idea Board. (Make sure staff can see the Idea Board as you introduce it.)
 - *To get started, I'm going to introduce the Idea Board and give an overview of how it will help us quickly prioritize new ideas and understand why we pursue some ideas and do not pursue others.*
 - *An Idea Board is a place to prioritize your ideas about improving the unit in a way everyone can see. During our daily huddles, we'll review each new idea posted on the board as a group and assign it to one of the four categories: Implement, Challenge, Possible, or Do Not Pursue. If the new idea is assigned to "Implement," then we can move forward with the idea.*
 - *I know this board looks complicated. Don't worry. I'm going to help you understand how it works by walking through the process step by step. After I finish explaining the steps, we'll practice using the Idea Board with two examples.*
- b. Explain the New Idea Form.
 - Distribute the handout called "New Idea Form."
 - *Let's get started. To use this board, we need your ideas about improving the unit. For example, you may have an idea that will help improve [state one of your unit's priorities]. To submit this idea, fill out the New Idea Form by describing the problem you observed, what is causing the problem, and your proposed solution. Then, put the form in the envelope labeled "New Ideas."*
 - *You can sign your name on the form, but you don't have to. I want you all to feel comfortable submitting your ideas.*
 - *We'll store additional copies of the form [location where you'll store copies].*

c. Describe the Idea Board.

- *Before we jump in to how to triage ideas, let's take a minute to better understand the four categories on the board.*
- *There are two considerations that help us decide which category to sort a new idea into: complexity and benefit. "Complexity" refers to how hard or easy a new idea will be to accomplish. For example, if a new idea requires organizational support and a lot of time and resources, it may be more complex than some other ideas. The other axis, "Benefit," means how much a new idea helps the unit. For example, if an idea supports our unit priorities and enhances the patient experience, then it will have a high benefit to our unit.*
- *Each time we review a new idea, we'll decide the complexity and benefit of the idea and then place it in the corresponding category.*
 - *If an idea is low-to-medium complexity and medium-high benefit, then it will go in the "Implement" category on the top left.*
 - *If an idea is low complexity and low benefit, then it will go in the "Possible" category on the bottom left.*
 - *If an idea is high complexity and medium-to-high benefit, then it will go in the "Challenge" category on the top right.*
 - *If an idea is high complexity and low benefit, then it will go in the "Do Not Pursue" category on the bottom right.*

d. Describe the Idea Triage Process.

- *Distribute the handout called "Idea Triage Cheat Sheet."*
- *As I mentioned, we'll review new ideas during our daily huddle and decide what category they belong in. This cheat sheet will help guide our idea review with two steps.*
- *First, we'll decide if a new idea is complex and if it will benefit our unit. On your handout, there are some questions to help us decide.*
- *Second, we'll select the best category based on the complexity and benefit. Again, the handout contains some guidance to help us do this. But, remember that this is a group discussion, so we'll use this cheat sheet as a guide but base our decision on the group discussion.*
- *If we put an idea in the "Do Not Pursue" category, we'll remove it from the board. If we put in the "Implement" category, we'll decide if we want to begin immediately working on it or not. We'll base this decision on the number of projects that are already underway and how much time we have. Remember, all ideas are valuable even if we don't prioritize them this time.*

e. Discuss the Tracking Process.

- *If we decide to pursue an "Implement" idea, I'll ask for a volunteer to "own" the idea. This person will oversee the project and update us on its progress during daily huddles.*

3. Demonstrate the Idea Board in Action: 10 minutes

Goal: Reinforce how the Idea Board works by walking through two examples as a group.

a. Introduce the practice exercise.

- *Now that I explained the Idea Board, we're going to practice using it with two examples.*
- *Make sure the cheat sheet is handy. It will be helpful during this exercise.*

b. Read the "Do Not Pursue" example you prepared or New Idea Form: Example 1 found on page 35. Then ask the group to prioritize the idea using the following prompts.

- *Now we're going to decide if the idea is complex. Let's walk through the four questions listed on the "Idea Triage Cheat Sheet" handout.*

- *Will it require a lot of time?*
The group should answer "yes."
- *Will it require a lot of resources?*
The group should answer "yes."
- *Will it require a lot of stakeholders?*
The group should answer "yes."
- *Will it require organizational approval?*
The group should answer "yes."

If you write your own examples, the group's exact answers may be different than the answers listed. These are based on the examples we provide on pages 35 and 36.

- *So, that's four "yes" answers. Is this a low-, medium-, or high-complexity idea?*
The group should decide that this example is high complexity.

- *Now let's decide if the idea benefits the unit.*

- *Does it align with unit priorities?*
The group should answer "no."
- *Will it save time?*
The group should answer "no."
- *Will it improve quality or safety?*
The group should answer "no."
- *Will it engage staff?*
The group should answer "no."
- *Will it enhance patients' experience?*
The group should answer "yes."

- *So, that's one "yes." Is this idea beneficial?*
The group should decide that this example has low benefit.

- *So, this example has high complexity and low benefit. Based on our assessment, which category should we assign this idea to?*

The group should decide that this idea belongs in the "Do Not Pursue" section.

- *Because this idea is a "Do Not Pursue," we'll remove it from the Idea Board.*

c. Read the "Implement" example you prepared or New Idea Form: Example 2 on page 36. Repeat the prioritization process.

- *We're going to repeat the process for another example. Let's decide if the idea is complex.*
 - *Will it require a lot of time?*
The group should answer "no."
 - *Will it require a lot of resources?*
The group should answer "no."
 - *Will it require a lot of stakeholders?*
The group should answer "no."
 - *Will it require organizational approval?*
The group should answer "no."
 - *So, that's zero "yes" answers. Is this a low-, medium-, or high-complexity idea?*
The group should decide that this example is low complexity.
- *Now let's decide if the idea benefits the unit.*
 - *Does it align with unit priorities?*
The group's answer will depend on your unit's priorities. If needed, review your unit's top three priorities.
 - *Will it save time?*
The group should answer "no."
 - *Will it improve quality or safety?*
The group should answer "yes."
 - *Will it engage employees?*
The group should answer "no."
 - *Will it enhance the patient experience?*
The group should answer "yes."
 - *So, that's two "yes" answers. Is this idea beneficial?*
The group should decide that this example has medium benefit.
- *So, this example has low complexity and medium benefit. Based on our assessment, where should we assign this idea?*
The group should decide that this idea belongs in the "Implement" section.
- *Because this idea is an "Implement," we would then decide if it is something we should pursue based on the number of other projects going on and how busy we are.*

4. Closing and Next Steps: 5 minutes or less

- a. Ask if anyone has initial feedback or questions. Then thank the group for their participation and discuss next steps.
 - *Thank you for your participation today. As a reminder, you can find the Idea Forms in [location where you'll store copies]. I encourage you to fill out a form when you have an idea, particularly if your idea addressed our unit priorities [remind staff of your unit's top three priorities].*
 - *If you have any questions or feedback, please let me know. Starting [date], we will use the Idea Board during daily huddles to help us better prioritize ideas. I look forward to hearing your great ideas!*

