

# 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

## Project Director

Jenna Koppel

koppelj@advisory.com

202-568-7154

## Contributing Consultant

Anne Herleth, MPH, MSW

## Managing Directors

Jennifer Stewart

Katherine Virkstis, ND

## Design Consultant

Lilith James

## Executive Director

Steven Berkow, JD

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# Executive Summary

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## **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.

## Tool 1

# Decide Where to Focus First

### What This Tool Helps You Do

This tool helps you decide which of your unit's critical priorities you should focus on first.

### When to Use This Tool

Use this tool if you are responsible for improving unit outcomes on five or more metrics, and aren't sure where to begin.

### Tool Profile

Audit consisting of seven "yes" or "no" questions about each metric your unit is held accountable for.

### What You'll Need

#### Materials required:

- A copy of your unit dashboard (or a list of metrics your unit is accountable for and your unit's current and target performance on those metrics)
- Up to 15 copies of the Calculation Table on page 7 (print one copy for each metric)<sup>1</sup>

#### Time required:

- Eight minutes per metric

▶ Access this tool: [advisory.com/nec/unitoutcomes](https://advisory.com/nec/unitoutcomes)

<sup>1</sup>) You can also download the Calculation Table at [advisory.com/nec/unitoutcomes](https://advisory.com/nec/unitoutcomes).

## Directions for Nurse Managers

Follow these steps to decide which of your unit's critical priorities you should focus on first.

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### Step 1. Gather the necessary information.

1. **Print** one copy of your unit dashboard. If you do not have a unit dashboard, **collect**:
  - a. The full list of metrics used to measure your unit's performance
  - b. Your unit's current performance for each metric
  - c. Your unit's target performance for each metric

### Step 2. Rate which metrics are most important.

1. **Print** one copy of the Calculation Table on page 7 for each metric. You can also download the Calculation Table at [advisory.com/nec/unitoutcomes](http://advisory.com/nec/unitoutcomes).
2. **Write** the name, current performance, and target performance for your first metric at the top of your Calculation Table.
3. **Answer** the questions to determine how important it is to focus on this metric now.
4. **Circle** the number of points in the column corresponding to your answer.
5. **Add up** the points you circled in the table. **Write** the total point value in the bottom row.
6. **Repeat** for each of your remaining metrics on a separate copy of the Calculation Table.

### Step 3. Narrow your list of metrics.

1. **Sort** the metrics based on their total point values into the Metric Prioritization Table on page 8. There are five spaces provided for each category, but you may not need them all.
2. **Count** the number of metrics with 9 to 14 points in your Metric Prioritization Table.
3. **Select** your top three metrics to focus on.
  - a. If there are more than three metrics with 9 to 14 points, circle the three metrics that have the highest score and target those three metrics. If there are more than three metrics with the same score, target the three metrics where you think you can make the biggest impact on performance.
  - b. If there are no metrics with 9 or more points, target the three metrics in your table with the highest score.

## Calculation Table

**Metric:** \_\_\_\_\_

**Current Performance:** \_\_\_\_\_

**Target Performance (if applicable):** \_\_\_\_\_

Question	Yes	No
1. Did leaders at your organization ask your unit to focus on this metric in the near term?	3 points	0 points
2. Is your unit performing below target on this metric?	3 points	0 points
3. If you don't make this metric a priority, is there a direct quality or safety risk posed to patients?	3 points	0 points
<p><b><i>If you select 'No' for questions 1, 2, and 3, you do not need to prioritize this metric. Write the metric in the "Deprioritize" category in your Metric Prioritization Table on page 8, and begin at question 1 for your next metric. Otherwise, continue to question 4.</i></b></p>		
4. Does performance on this metric directly impact your organization's potential reimbursement or financial penalty, such as Pay for Performance?	2 points	0 points
5. Does performance on this metric impact your unit's performance on other key metrics?	1 point	0 points
6. Did leaders introduce department-wide or facility-wide initiatives to address performance on this metric?	0 points	1 point
7. Do you feel there is room for meaningful improvement on this metric?	1 point	0 points

**Total Points (sum points circled):** \_\_\_\_\_

Source: Nursing Executive Center research.

## Metric Prioritization Table

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Total Point Value	Metric	Score	Guidance
9 to 14 points	<ul style="list-style-type: none"> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> </ul>	_____ _____ _____ _____ _____	<p><b>Prioritize.</b> This metric is important and an urgent concern. Focus improvement efforts on this metric in the near term.</p>
5 to 8 points	<ul style="list-style-type: none"> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> </ul>	_____ _____ _____ _____ _____	<p><b>Sequence.</b> This metric is important, but is probably less urgent than metrics marked as “Prioritize.” So, come back to this metric only after you make progress on the metrics marked as “Prioritize.” This may mean revisiting this metric in your mid- to long-term work plan.</p>
0 to 4 points	<ul style="list-style-type: none"> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> </ul>	_____ _____ _____ _____ _____	<p><b>Deprioritize.</b> This metric may merit your attention, but not urgently. Come back to this metric if there is a change in unit performance or if leaders from your organization ask you to focus on this metric.</p>



## Tool 2

# Get to the Root of Your Problem

### What This Tool Helps You Do

This tool helps you identify underlying reasons your unit is struggling with performance on a given metric, and prioritize which problems to solve first.

### When to Use This Tool

**Use this tool if you answer “yes” to at least one of these questions:**

- Is your unit’s performance on a high-priority metric below target?<sup>1</sup>
- Is performance on this metric *not* on track to improve within the time frame you expected?
- Did performance on this metric slip over time, even though you have tried to introduce targeted improvement initiatives?

### Tool Profile

**This tool consists of:**

- Quick Conversation Guide (to use with staff)
- Root Cause Question Set

### Time Required

- 10 minutes to prepare for a conversation with staff to get their perspective on why your unit is struggling with performance on the metric
- 30 minutes to have a conversation with staff
- 45 minutes to review the Root Cause Question Set and identify your best opportunities for improvement

▶ Access this tool: [advisory.com/nec/unitoutcomes](https://advisory.com/nec/unitoutcomes)

1) If you aren’t sure which metrics are high priority, refer to Tool 1: Decide Where to Focus First.



## Directions for Nurse Managers

Follow these steps to find the underlying reasons why your unit is struggling with performance on a metric, and to narrow down which improvement opportunity you should pursue first.

### Step 1. Reframe your problem as a question.

1. **Write** the metric your unit is struggling to improve performance on in the blank space below. Use this example for guidance.

Example Problem:

Why is my unit struggling to \_\_\_\_\_ *reduce patient falls* \_\_\_\_\_?

Your Problem:

Why is my unit struggling to \_\_\_\_\_? \_\_\_\_\_?

### Step 2. Ask your staff why they think this is a problem.

1. **Make a list** of three to five high-performing staff members on your unit to include in a conversation about what's going wrong.
2. **Schedule** 30 minutes to meet with the group. If it is difficult to get time with everyone at once, offer two or three dates and times for staff to choose from.
3. **Use** the Conversation Guide on page 14 during your meetings to facilitate a conversation with the selected staff members. You can take notes in the space provided.

To get a variety of perspectives, include staff from multiple disciplines (e.g., nursing, support staff) and different shifts (e.g., day shift, night shift).

### Step 3. Brainstorm additional potential root causes.

1. **Gather** relevant information, including your unit's performance on this metric over the past six months, and notes from any conversation(s) with staff from Step 2.
2. **Answer** the questions on pages 18 and 19 using the information you gathered and any of your own thoughts or observations. **Place a checkmark** in the box next to your answer.

For any questions where your answer is "no":

- a. **Ask yourself:** Why is this occurring? **Write** your answer in the space provided. Your answer is a potential root cause.
  - b. **[If it's not clear how you would solve the root cause] Ask yourself** again: Why is this occurring? **Write** your answer in the space provided.
  - c. **Continue to ask** "why?" until you've identified a root cause with a more apparent solution.
3. **Write** any additional ideas about what might be causing performance to move in the wrong direction in the spaces provided. These ideas can come from your conversation with staff or your own observations.

**Step 4. Prioritize your best opportunities.**

1. **Circle** up to three root causes on pages 18 and 19 that you think have the biggest negative impact on your problem (your unit’s performance on your metric). If any express the same problem, select the one you think is closest to the underlying root cause.
2. **Copy** these root causes into the Solvability Table below.
3. **Rate** how difficult it will be to solve each root cause using the following scale. Then, **write** your score in the “Difficulty” column of your Solvability Table.



**Difficulty Rating Scale:** How hard will it be to resolve this root cause? Consider time, resources, and staff willingness to make changes.

**Scoring:** 4=Impossible, 3=Very Difficult, 2=Somewhat Difficult, 1=Easy

4. **Rate** the relative impact of solving each root cause using the following scale. Then, **write** your score in the “Relative Impact” column of your Solvability Table.



**Relative Impact Rating Scale:** If I solve this root cause, how much will my unit improve performance on the metric?

**Scoring:** Rank order the root causes from most impactful to least impactful. (1=Greatest Impact, 3=Least Impact)

5. **Multiply** Difficulty x Relative Impact for each root cause. **Write** this number in the last column of your Solvability Table.
6. **Circle** your lowest-scoring root cause. This is the first problem you should tackle to improve performance on the metric.

If you rated your lowest-scoring root cause “Impossible” to resolve, instead choose the second-highest-scoring root cause.

**Solvability Table**

Root Cause	Difficulty	Relative Impact	Difficulty X Relative Impact

**Step 5. Consider next steps for solving the problem.**

**1. List** up to three specific actions you can take to address the root cause you circled in the previous step.

1 \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2 \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3 \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Conversation Guide

This guide will help you get valuable insight from staff on the underlying reasons your unit is struggling with a metric. Prepare for conversations with staff by reading the directions and filling in the blanks.

---

## 1. Introduction: 2 minutes

**Goal:** Ensure staff understand the purpose of the conversation.

a. Explain why you've invited them to meet with you.

- *Thank you for taking the time to talk with me today. I scheduled this time with you because I'd like your help understanding why our unit is struggling with performance on [your metric] \_\_\_\_\_.*  
*In other words, [explain your metric in a way that's easier to understand, such as "our fall rate is too high"] \_\_\_\_\_.*
- *Understanding what's at the root of this problem will help us find out the best way to solve it. I value your opinion and insights on what you think might be going wrong, or what you think we can do better. Also, because you are the closest to what happens on our unit, you may notice things that I'm not aware of.*
- *Anything you share with me will be kept completely confidential, and I hope you'll be open and honest. All ideas are welcome!*







**3. Closing and Next Steps:** 2 minutes

- a. Thank staff for their time and discuss next steps.
  - *Thank you again for taking the time to meet with me today.*
  - *Your thoughts and feedback have been extremely helpful as we look for ways to improve performance on [your metric] \_\_\_\_\_.*
  - *My next steps are to reflect on your comments, and think about what is the biggest opportunity for us to address to solve this problem. I'll make sure to keep you up to date on our progress and anything else coming out of this conversation.*
- b. Ask staff if they have any questions.
  - *Do you have any questions about anything we've talked about today?*

# Root Cause Question Set

Answer the questions below using your thoughts and observations as well as any information gathered from staff. Place a checkmark in the box next to your answer.

If your answer is “no”:

- Ask yourself, “*Why is this occurring?*” Write your answer in the space provided.
- If it’s not clear how you’d solve that root cause, ask again, “*Why is this occurring?*” Write your answer in the space provided.
- Continue to ask “*why?*” until you have identified a root cause with a more apparent solution.

Do staff feel a sense of **personal ownership** for performance?

Yes

No

↓  
*If “No”*

Do staff **understand what they can do** to improve performance?

Yes

No

↓  
*If “No”*

Do staff **have the equipment** they need to improve performance?

Yes

No

↓  
*If “No”*

<b>Why?</b> _____ _____ _____	<b>Why?</b> _____ _____ _____	<b>Why?</b> _____ _____ _____
<b>Why?</b> _____ _____ _____	<b>Why?</b> _____ _____ _____	<b>Why?</b> _____ _____ _____
<b>Why?</b> _____ _____ _____	<b>Why?</b> _____ _____ _____	<b>Why?</b> _____ _____ _____

Write any other ideas you have on why your unit struggles with performance on your metric here:

\_\_\_\_\_

\_\_\_\_\_

Do staff **have the skills** they need to improve performance?

Yes

No

↓  
*If "No"*

Do staff **have the time** they need to improve performance?

Yes

No

↓  
*If "No"*

Do staff **have the support** they need from team members to improve performance?

Yes

No

↓  
*If "No"*

<p><b>Why?</b></p> <hr/> <hr/> <hr/>	<p><b>Why?</b></p> <hr/> <hr/> <hr/>	<p><b>Why?</b></p> <hr/> <hr/> <hr/>
<p><b>Why?</b></p> <hr/> <hr/> <hr/>	<p><b>Why?</b></p> <hr/> <hr/> <hr/>	<p><b>Why?</b></p> <hr/> <hr/> <hr/>
<p><b>Why?</b></p> <hr/> <hr/> <hr/>	<p><b>Why?</b></p> <hr/> <hr/> <hr/>	<p><b>Why?</b></p> <hr/> <hr/> <hr/>
<p>Write any other ideas you have on why your unit struggles with performance on your metric here:</p> <hr/> <hr/>		



# Communicate Unit Priorities to Staff

## What This Tool Helps You Do

This tool equips you to have a series of conversations with staff about improving performance on top unit priorities, and help staff understand why these priorities are important.

## When to Use This Tool

We recommend all nurse managers use this tool to help staff understand why your unit's priorities are important and what they can do to drive improvement.

**You are ready to use this tool if you answer “yes” to all the following questions:**

- Do I know what my unit's top improvement priorities are?<sup>1</sup>
- Can I access data on my unit's current performance in these areas?
- Have I introduced initiatives or things staff can do to improve unit performance in these areas?

## Tool Profile

**This tool consists of:**

- Frontline Dashboard Template and instructions to display unit priorities
- Unit Priority Discussion Guide

## What You'll Need

**To get started:**

- Whiteboard (at least 3"x2") and markers
- 15 minutes for material prep
- 15 minutes to introduce your Frontline Dashboard to staff

**On an ongoing basis:**

- 15 minutes to update your unit's Frontline Dashboard every two to four weeks
- 5 to 10 minutes of discussion at change-of-shift or unit huddle

▶ Access this tool: [advisory.com/nec/unitoutcomes](https://advisory.com/nec/unitoutcomes)

1) If you're not sure what your unit's top priorities are, use Tool 1: Decide Where to Focus First.

## Directions for Nurse Managers

Follow these steps to introduce a Frontline Dashboard and lead ongoing discussion about improving performance on unit priorities.

### Step 1. Create—or enhance—your Frontline Dashboard.

#### 1. [If you already have a Frontline Dashboard, or already display unit priorities]

**Take the quick audit** on the right to learn if you have any opportunities to do this more effectively. If all the statements accurately describe your dashboard, skip to Step 2 on page 23. If you answer “no” to one or more questions, continue reading Step 1 to improve your dashboard.

#### 2. List your unit’s top three to four priorities on the whiteboard. These are metrics that you have identified as your unit’s current areas for improvement, where you can access up-to-date information on progress. Do not select a metric for your Frontline Dashboard if you won’t be able to update your unit on performance at least every three weeks.

**Use** the template and example on page 24 as a guide.

#### 3. Write your unit’s current and target performance to the right of each metric in a way that’s easy for staff to understand, or “humanizes” the data to make it personally meaningful. **Consider reframing your metric** using one of these options:

- a. **Use absolute numbers.** For example, instead of displaying rates or percentages, you can convert this into number of patient cases, such as “[X] infections in July.”
- b. **Highlight how your metric relates to the patient experience.** For example, instead of showing “[X]% compliance with diabetes indicators,” show “[X]% diabetes patients receiving perfect patient care.”
- c. **Use an image to show unit progress.** For example, draw a pie graph or thermometer chart.

#### 4. Hang the whiteboard in your daily huddle area or in an area staff often pass by. Now staff can see your unit’s top priorities at all times.

### Quick Audit

*My unit’s frontline dashboard*  
(select all that apply):

- Pinpoints no more than three unit priorities that are most important to my organization
- Displays current performance for the metrics I’m using to track progress
- Displays unit-specific targets for each metric
- Makes performance data meaningful for staff by reframing metrics that are harder to understand
- Reminds staff about specific actions they can take to help improve performance
- Is located in a place where staff on the unit can see it on a daily basis

**Step 2. Introduce the Frontline Dashboard to your staff.**

1. **Use** the Unit Priority Discussion Guide, Part 1 on page 25 during a change-of-shift huddle or another scheduled meeting. You'll need 15 minutes.

**Step 3. Remind staff about your unit's priorities regularly.**

1. **Update** your Frontline Dashboard with your unit's current performance, and any new initiatives you've introduced. Do this every week—or less often if you don't have regular access to this information.
2. **Use** the Unit Priority Discussion Guide, Part 2 on page 27 once per week during your change-of-shift huddle. You'll need 5 to 10 minutes.

**Step 4. Keep staff up to date on new priorities.**

1. **Remove** priorities as they become less important (for example, if your unit hits target performance)—and celebrate your unit's success by recognizing staff in a way that's professionally meaningful.
2. **Add** new priorities as they become important.
3. **Use** the Unit Priority Discussion Guide, Part 3 on page 28 during your change-of-shift huddle to communicate updates. You'll need 10 minutes.

See pages 80-90 of *The National Prescription for Nurse Engagement* for best practices to recognize staff for specific accomplishments in ways that are professionally meaningful. You can download the publication at [advisory.com/nec](http://advisory.com/nec).

# How to Draw a Frontline Dashboard

Use this template and example to draw your own Frontline Dashboard.

## Frontline Dashboard Template

Our Unit's Top Priorities			
	What's Our Goal?	How Are We Doing Now?	What Are We Doing to Get There?
1			
2			
3			



## Example Frontline Dashboard

Our Unit's Top Priorities			
	What's Our Goal?	How Are We Doing Now?	What Are We Doing to Get There?
1	Increase days without falls	100 days without falls	7 days without falls <ul style="list-style-type: none"> <li>Intensified toileting protocol for patients vulnerable to falls</li> </ul>
2	Increase % of patients who rate communication with nurses a 9 or 10 (out of 10)		 <ul style="list-style-type: none"> <li>Use 3-day teach-back</li> <li>Record discharge instructions for patients</li> </ul>
3	Eliminate Catheter-associated UTIs	Zero!	5 in October <ul style="list-style-type: none"> <li>New protocol allows RNs to remove Foley catheters without physician order when appropriate</li> </ul>

Source: Nursing Executive Center research.



# Unit Priority Discussion Guide

Use this discussion guide to:

- Introduce your Frontline Dashboard to staff during a change-of-shift huddle or another scheduled meeting (Part 1)
- Remind staff about unit priorities once a week during your change-of-shift huddle (Part 2)
- Update staff on new priorities (when applicable) during your change-of-shift huddle (Part 3)

Read over this Discussion Guide in advance and fill in any blanks. When you meet with staff, ensure they can see the Frontline Dashboard.

---

## PART 1 .....

### Introduce Your Frontline Dashboard to Staff: 15 minutes

#### Key points to cover:

- *This is our Unit Dashboard. It displays the most important goals for our unit, and how we are performing on them.*
- *I figured out what to include on the dashboard by [describe how you determined which priorities to display] \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_.*
- *If something isn't listed here, it doesn't mean it's not important. But these three goals should be considered higher priorities.*
- *I'm hanging this dashboard where you can see it on a regular basis. Every few weeks, we'll check in together about which priorities are on the dashboard to make sure we're all on the same page about where our unit needs to focus. You can also ask questions about why we need to focus here and what we're doing as a unit to do better in these areas.*

Then ask: *Do you have any questions so far?*

- *Let's spend a few minutes reviewing our unit's current priorities. Those are the three numbered items I listed on the whiteboard today.*
- *The first priority is [your first priority] \_\_\_\_\_*  
*In other words, [describe the metric or priority in your own words or in a way that will be easier for staff to understand] \_\_\_\_\_*
- *The reason we care about this is [explain why performance in this area is important] \_\_\_\_\_*
- *So you can get a picture of how we're doing in this area now, I've included our current performance, [state current performance] \_\_\_\_\_ compared to our goal or ideal performance, which is [state target performance] \_\_\_\_\_.*
- *There are a few things we're already doing as a unit to improve and reach our goal. They are [describe the initiatives already in place] \_\_\_\_\_*

For example: "The first priority is to improve our unit's 'nurse communication' score. This is how patients rate communication with nurses on a national survey called HCAHPS."

For example: "We care about HCAHPS because our performance directly impacts our organization's finances. If we do well, our hospital will earn a bonus. If we do poorly, we may lose a portion of our reimbursement for Medicare patients. The survey results are also widely available and patients can compare the performance of different hospitals—so it impacts our reputation. Most importantly, our communication with patients is important for equipping patients to follow their care plan and stay healthy."

Ask: *Do you have any questions about why this is a top focus for our unit?*

Follow up with:

- *Is anyone surprised that this is a top priority?*
- *Is anyone not familiar with any of these things we can do to improve?*
- *Do you have any questions about how doing these things can help to improve performance in this area?*
- *Do you have any ideas for other things we can do, or do better, to improve our performance in this area?*

Use Tool 4: Isolate Staff Members' Best Ideas for a quick and easy process to discuss staff ideas.

Repeat for the remaining priorities on your dashboard. After each priority, pause for any questions.

Wrap up:

- *I'll update this board on a regular basis as our priorities change—for example, if we improve in one area over time, I may replace that priority with a new one. If that happens, I'll make sure to explain the new priority.*
- *Please feel free to ask me questions about anything on this board at any time.*

**PART 2** .....

**Remind Staff About Unit Priorities:** 5 to 10 minutes

Have this conversation with staff about a week after introducing the Frontline Dashboard.

**Key points to cover:**

- *Let's turn to the whiteboard to review our top priorities.*

[If your unit has made progress on one of the metrics:]

- *You can see our unit has made progress on one of these areas, [state the priority] \_\_\_\_\_ . Congratulations! We're now closer to our goal of [state target performance] \_\_\_\_\_ .*
- Then ask: *What do you think has worked well?*
- Then ask: *Why do you think we haven't reached our goal yet?* [If staff aren't able to identify on their own why your unit hasn't hit its target yet, ask:] *Do you have any ideas for other things we can do, or do better, to improve our performance in this area?*

[If there have been no changes in one or more priorities since the last time you reviewed them with your staff:]

- *These haven't changed since the last time we reviewed them together. So, we'll still need to focus on these areas, which are [review the priorities].*

Then ask for each of these priorities:

- *Why do you think we've had trouble making progress?*
- *What can we do to make any of the things we're doing to improve more effective?*
- *Do you have any ideas for what we can do better?*

**PART 3** .....

**Update Staff on New Priorities: 10 minutes**

Have this conversation with staff when you update the Frontline Dashboard with a new priority.

**Key points to cover:**

- *Great news! We achieved our goal of \_\_\_\_\_!  
It's amazing to see what we can accomplish together when we make something a priority and set an achievable goal!*
- *Because we hit our target for [state priority that is no longer on the board] \_\_\_\_\_, I've taken it off our top priority list.*
- *That means we can make room for a new priority. The priority is [state the priority] \_\_\_\_\_  
In other words, [describe the metric or priority in your own words or in a way that will be easier for staff to understand] \_\_\_\_\_.*
- *The reason we care about this is [explain why performance in this area is important] \_\_\_\_\_.*
- *So you can get a picture of how we're doing in this area now, I've included our current performance, [state current performance] \_\_\_\_\_, compared to our goal or ideal performance, which is [state target performance] \_\_\_\_\_  
Until we get closer to our goal, this is a top priority for our unit.*
- *There are a few things we're already doing as a unit to improve and reach our goal. These are [describe the initiatives already in place] \_\_\_\_\_.*

Then ask: *Do you have any questions about why this is a top focus for our unit?* Follow up with:

- *Is anyone surprised that this is a top priority?*
- *Is anyone not familiar with any of the things I've listed here that we're already doing to help us improve?*
- *Do you have any questions about how these things can help us improve our performance and get closer to our goal?*
- *Do you have any ideas for what we can do better?*

# 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](https://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](http://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.

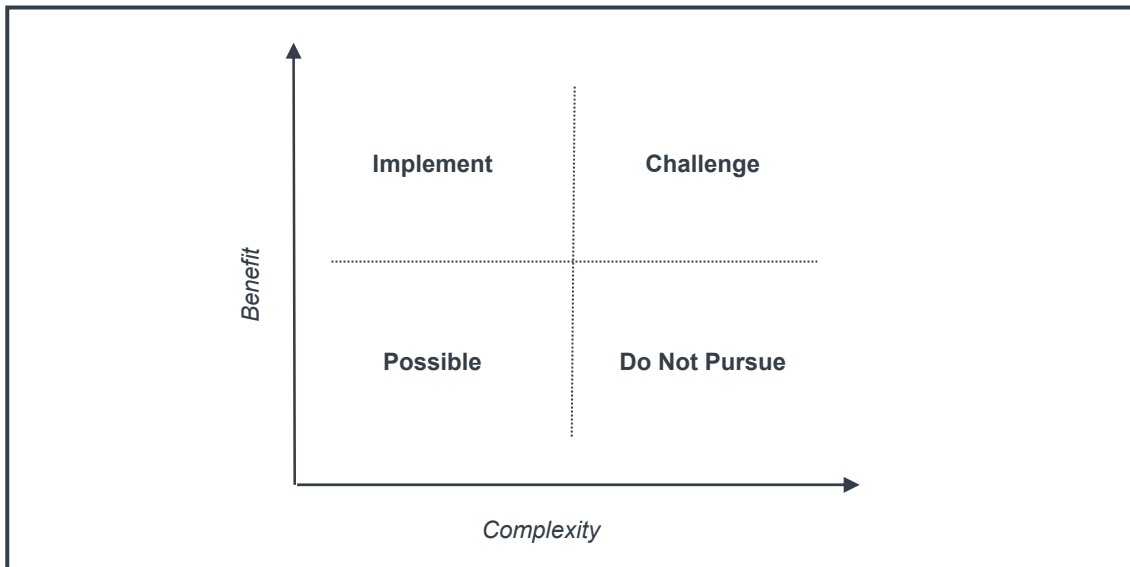
### Step 5. At each change of shift, take five minutes to discuss current projects.

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.**

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**Why is it happening?**

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**How can we fix it?**

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# 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

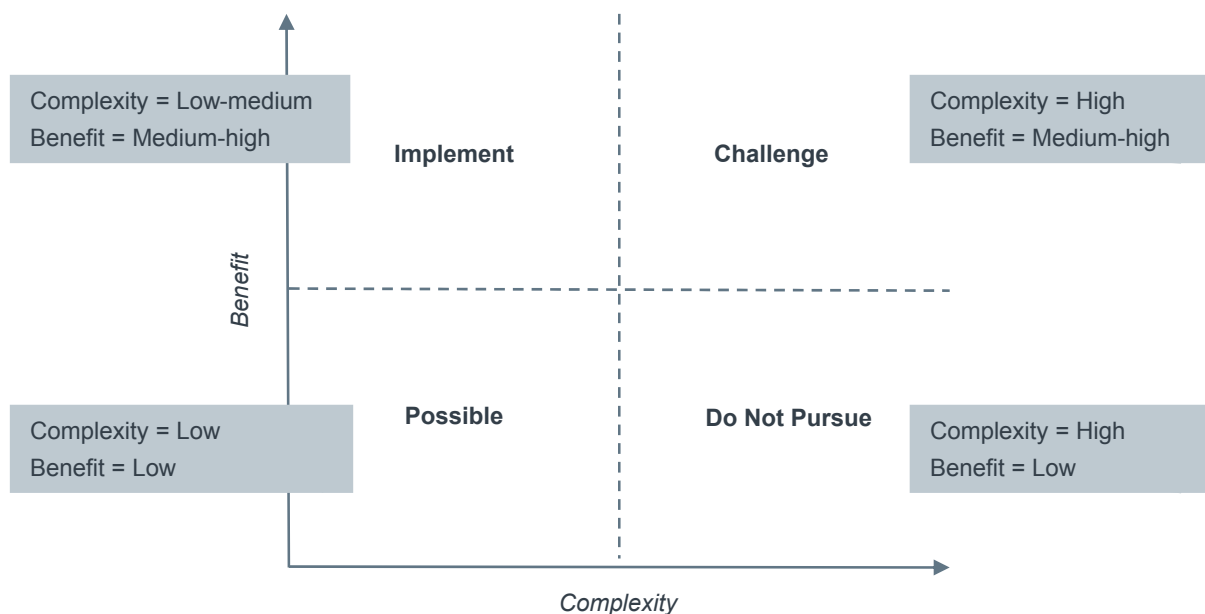
### How will this idea benefit your unit?

- 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.*

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**Why is it happening?**

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

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**How can we fix it?**

*Build a new parking structure.*

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## 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.*

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### 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.*

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### How can we fix it?

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

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# 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!*

# Avoid Rolling Out Multiple Projects at Once

## What This Tool Helps You Do

This tool helps you schedule and space out your improvement projects across the year. It will help you avoid unnecessary overlap of projects to make sure you and staff can dedicate the right amount of time and effort to implementing any initiative effectively.

## When to Use This Tool

Use this tool if you have more than one improvement project to roll out across your unit in the next 12 months.

We do recommend managers use this tool to prevent staff from feeling overloaded or overwhelmed by the pace of change.

## Tool Profile

### This tool consists of:

- Excel-based Unit Change Calendar template
- Instructions for building a Unit Change Calendar

## What You'll Need

### To get started:

- Download our Excel-based template at [advisory.com/nec/unitoutcomes](https://advisory.com/nec/unitoutcomes)
- Block one hour on your calendar to create your Unit Change Calendar

### On an ongoing basis:

- Block 20 minutes on your calendar once a month to review and update your Unit Change Calendar

▶ Access this tool: [advisory.com/nec/unitoutcomes](https://advisory.com/nec/unitoutcomes)

## Directions for Nurse Managers

Follow these steps to create a Unit Change Calendar and to use your calendar to sequence improvement projects.

### Step 1. Gather the necessary information.

1. **List** all the system-, facility-, and department-driven changes coming up in the next 12 months that will affect staff on your unit.
2. **List** all the unit-based improvement initiatives you plan to introduce in the next 12 months.

### Step 2. Create your Unit Change Calendar.

1. **Download** the Excel-based Unit Change Calendar Template at [advisory.com/nec/unitoutcomes](http://advisory.com/nec/unitoutcomes).



Unit Change Calendar.xlsx

2. **Fill in** the system-, facility-, and department-driven changes from your list in the rows next to “Department- or Organization-Driven Changes.” Then **fill in** the start and end dates (if they are known) next to each change.
3. **Color in** the cells that correspond with the dates of these changes. For example, if a change will roll out on February 1st and finish by March 1st, color in the cells beneath the four weeks in February.
4. **Fill in** the unit-driven initiatives or projects from your list in the rows next to “Unit-Driven Changes.” Then **fill in** your proposed start and end dates next to each initiative or project, and **color in** the cells that correspond with the dates of these changes.
5. **[Optional] Color code** each change using the Color Code Key in the third tab of the Excel document.

Check out our example Unit Change Calendar in the second tab of the Excel document for more guidance.

**Step 3. Identify and troubleshoot big disruption periods.**

1. **[If a unit-driven change overlaps with or two or more moderately disruptive or very disruptive changes]** Select the statement below that best describes your situation, and use the corresponding next steps.

If you're using the Color Code Key, these will be yellow or red.

Statement	Example	Next Steps
<input type="checkbox"/> Your timeline for implementation is flexible.	A new initiative to recognize peers with handwritten "Kudos cards."	<b>Reschedule the unit-driven initiative.</b> This may mean shifting it forward or back one or two weeks, or rescheduling it for another month.
<input type="checkbox"/> You need to implement this change in a certain time frame.	A training series in preparation for upcoming hospital-wide EMR go-live date.	<b>Talk to your director or CNO</b> about how to prioritize, or about whether it's possible to adjust the timing of a department- or organization-driven change.  <b>Bring the following items to this conversation:</b> <ol style="list-style-type: none"> <li>1. A copy of your Unit Change Calendar.</li> <li>2. Your recommendation on which change you think should be rescheduled and why.</li> <li>3. Two or three suggestions for how to adjust the scheduled timing for these changes.</li> </ol>

**Step 4. Review and update the calendar every month.**

1. **Set a recurring calendar hold** once a month for 20 minutes to review and update your Unit Change Calendar.
2. **Use** this time to:
  - a. **Add** new changes or projects to your calendar.
  - b. **Adjust** timing for upcoming changes based on your current priorities and direction you receive from leaders.

Source: Nursing Executive Center research.

