Journey Toward Ideal:
Defining 'What Good Looks Like'
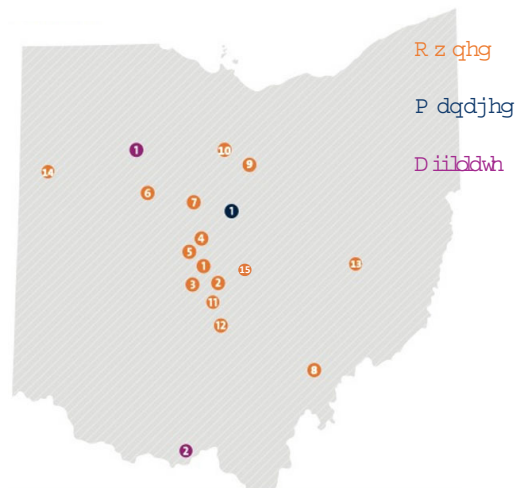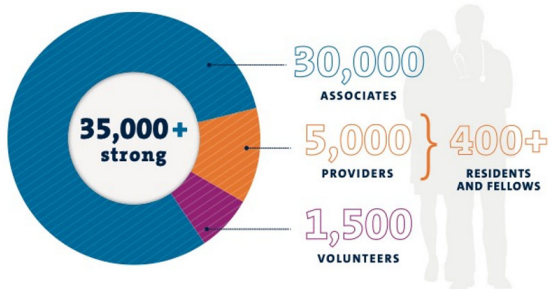
Emily Swaney, Sr. Director Lean Promotion Office
Alli Kulp, Sr. Advisor Lean Promotion Office

OhioHealth

WHO WE ARE

We are a faith-based, not-for-profit healthcare system.

35,000+ strong

30,000 ASSOCIATES

5,000 PROVIDERS } 400+ RESIDENTS AND FELLOWS

1,500 VOLUNTEERS

R z qhg

P dqdjhg

D iilddwh

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WHAT WE'LL DISCUSS

OhioHealth's Lean Journey

The Successes

The Opportunity

The Approach

The Results

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What sets *great* organizations apart from good organizations is their ability to provide a **clear pathway to organizational excellence**
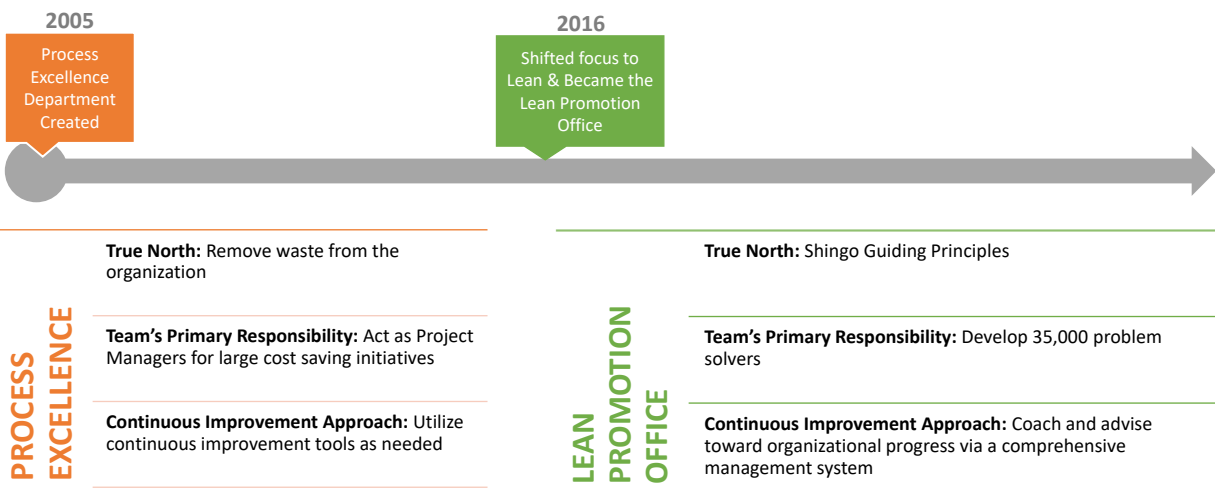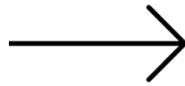
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OhioHealth's Lean Journey

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OUR LEAN JOURNEY

2005

Process Excellence Department Created

2016

Shifted focus to Lean & Became the Lean Promotion Office

PROCESS EXCELLENCE

True North: Remove waste from the organization

Team's Primary Responsibility: Act as Project Managers for large cost saving initiatives

Continuous Improvement Approach: Utilize continuous improvement tools as needed

LEAN PROMOTION OFFICE

True North: Shingo Guiding Principles

Team's Primary Responsibility: Develop 35,000 problem solvers

Continuous Improvement Approach: Coach and advise toward organizational progress via a comprehensive management system

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THE CHALLENGE

TEAM OF 11

→

35,000

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THE APPROACH

TEAM OF 11

Leaders

35,000

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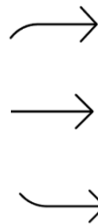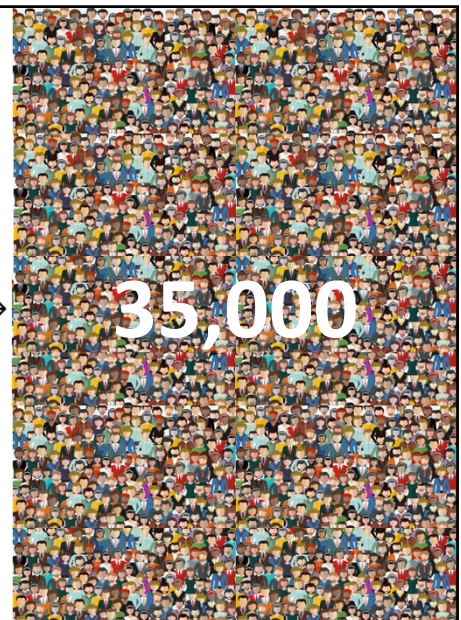
LEAN PROMOTION OFFICE
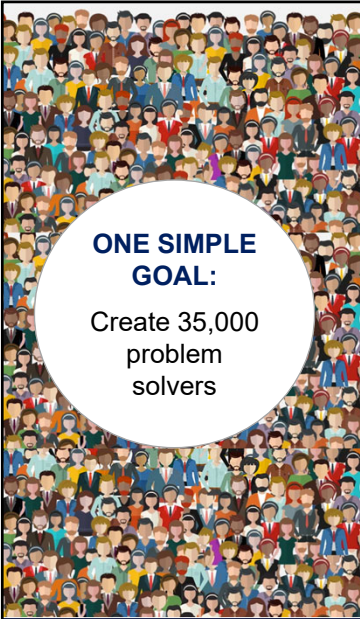
ONE SIMPLE GOAL:

Create 35,000 problem solvers

TEAM OF 11

LPO Work Breakdown

- Training
- Kaizen/A3 Facilitation
- Coaching
- Breakthrough Goal Deployment
- Operational Excellence Goal Deployment

Intense focus on strengthening the management system
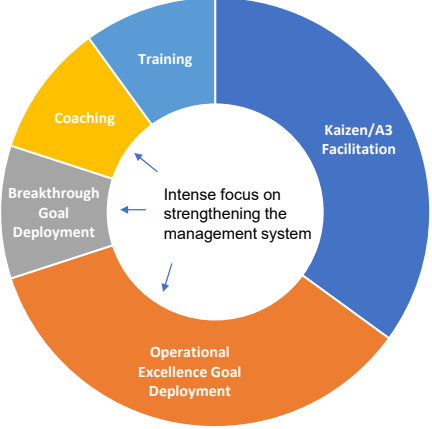
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OHIOHEALTH'S LEAN MANAGEMENT SYSTEM
FY23 RECAP

Application of tools & understanding of behaviors

44 Kaizens Facilitated

100+ A3s Completed

600+ Active KPI Boards

24 Goal Deployment X-Matrices

2,000+ Leaders Trained on Humble Inquiry

1,500+ Leaders Trained on A3

1,500+ Leaders Trained on Leader Standard Work

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OHIOHEALTH'S LEAN MANAGEMENT SYSTEM
FY23 RECAP

Tiered Huddles Implemented System-Wide

Development of **sustainable processes** to support tools & behaviors

63 Daily Gemba Walks

Launched System-Wide Performance Close

100% of Hospitals with Lean Roadmap

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THE OPPORTUNITY

Application of tools & understanding of behaviors

Development of **sustainable processes** to support tools & behaviors

Clear vision of **ideal** use of tools & behaviors

We are here

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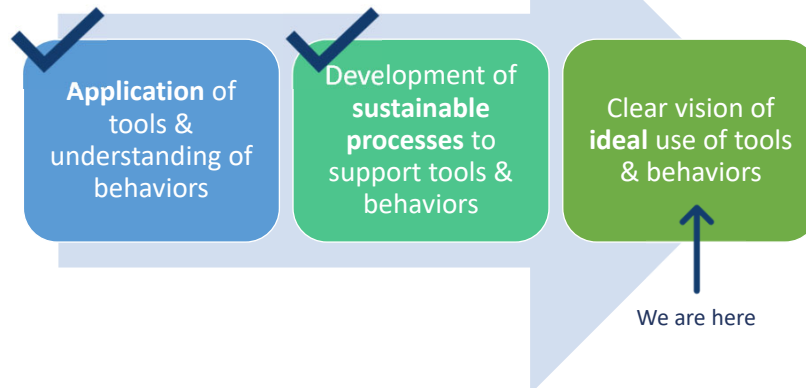
WHY DEFINE IDEAL?

Lean is **more than application of tools**;
it's applying tools when they're needed,
how they're intended to be used,
& with continuous improvement *always* at the core

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Defining Ideal:
Management System Elements

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THE PROBLEM TO SOLVE

Lack of visibility into what good looks like for our management system

Management system elements stagnant or backsliding

Leadership viewing Lean progression as the LPO's responsibility

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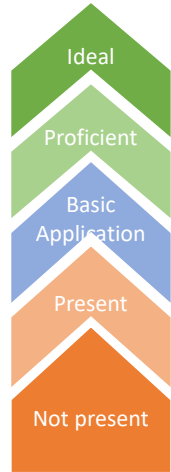# MANAGEMENT SYSTEM ASSESSMENT TOOL (MSAT)

OBJECTIVES

1 Clearly define 'what good looks like' (ideal) for each element of the management system

2 Provide insight into the current state of management system maturity

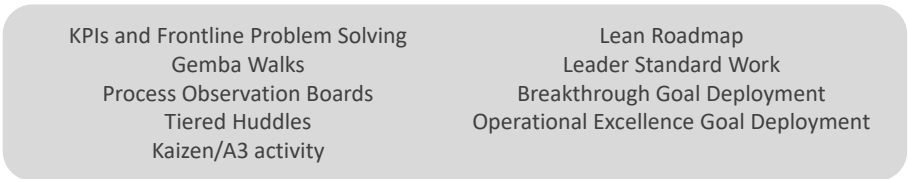**3** Act as primary input into lean roadmap development

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MANAGEMENT SYSTEM ASSESSMENT TOOL
HOW THE TOOL WORKS

Ideal
Proficient
Basic Application
Present
Not present

- Lists 9 major elements of OhioHealth's management system

  KPIs and Frontline Problem Solving
  Gemba Walks
  Process Observation Boards
  Tiered Huddles
  Kaizen/A3 activity

  Lean Roadmap
  Leader Standard Work
  Breakthrough Goal Deployment
  Operational Excellence Goal Deployment

- Defines the **progression** of management system elements from not present to ideal

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MANAGEMENT SYSTEM ASSESSMENT TOOL
HOW THE ASSESSMENT WORKS

Assessment Introduced to President → Self-Assessment Completed by Executive Team → Catchball Occurs with LPO → Current State Categorization "Locked In" → Executive Sets End-of-Year Targets in Each Category → Targets Drive Lean Roadmap Focus → Reviewed Quarterly for Progress Updates and Roadmap Revision

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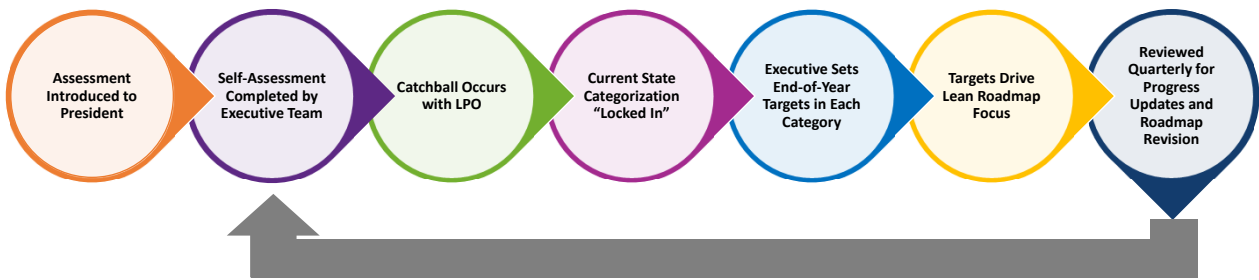
MANAGEMENT SYSTEM ASSESSMENT TOOL

MANAGEMENT SYSTEM PROGRESSION - SELF-ASSESSMENT

Foundational Element	LDM – KPIs and Front-line Problem Solving	LDM - Process Obs	LDM – Gemba Walk	Tiered Huddles	Rapid Cycle Improvement (Kaizens, A3s)	Lean Roadmap	Leader Standard Work	Goal Deployment – Breakthrough	Goal Deployment – Operational Excellence
Ideal	Teams select process-based KPIs that will close balanced scorecard performance gaps (regularly completing 5why Root cause analysis and documenting action plan progress). All levels of staff and all shifts engaged in LDM problem solving.	Tracking trends of Process Obs cards, and reintroducing as Daily KPIs when appropriate. Directors aware of process obs performance and coach to process during Gemba rounds.	Walkers show mastery of coaching pattern; Admin KPI board regularly used to improve process. Walkers go beyond system standard (i.e. off-shift walk/weekend) engaging full department.	Tiered Huddles being utilized daily (including a modified weekend/holiday process). Safety concerns, good catches and recognition are escalated appropriately. Follow-ups/resolution is completed and documented by leadership. Information/Feedback is consistently cascaded down. All areas are represented at Tiers 2, 3, 4, and 5 by the area leader or a delegate. Discussion is 80% look forward and 20% look back. All Tiers complete their huddles within 20 minutes.	A3s are occurring independently of LPO support; leaders engaged and coaching work teams. Clear connection to Goal Deployment strategy.	Lean Roadmap is reviewed on a regular basis by Executive team and continuously updated with the Business Unit's priorities	Use month-end results to PDSA tasks/meetings	Leadership recognizes GDP as the primary mechanism for driving strategic efforts at their care site/business unit; sites can operate monthly reviews independently of LPO	Leadership recognizes dashboard as the operational measures of success; sites can operate monthly reviews independently of LPO
Proficient	Teams demonstrate proficiency in using LDM 2.0 elements (quadrant updates, dashboard, and site scorecard). Broad Team engagement with demonstrated results achieved through LDM problem-solving.	Process Obs boards updated 2x/day; metrics are actively moved to process obs boards once retired. Process Obs boards presented during rounds at least x1/week.	Gemba walkers utilize coaching pattern to guide discussions. Walking cadence meets system standard of three days a week. Admin board exists and debrief with huddle post-walk.	Tiered Huddles being utilized daily (including a modified weekend/holiday process). Safety concerns, good catches and recognition are escalated appropriately. Clear differentiation between "for awareness" and "for escalation" exists with clear documentation for "escalations." Some feedback to staff is occurring related to escalated items.	Rapid cycle improvement activities are the choice tools for improving processes, with some connection to Goal Deployment activity	Lean Roadmap is up-to-date within a month and is reviewed on a regular basis with Lead Lean Executive	Leaders share their LSW with their direct reports and one-ups on a monthly basis and review their team's LSW on a monthly basis	Teams demonstrate proficiency in using the process (action plans & countermeasures) to achieve targets	Team regularly achieves operational targets by utilizing countermeasures on metrics. Countermeasures completed regularly for metrics missing target for 2 or more months without improvement; Metrics directly connect to BSC components
Basic Application	Teams demonstrate application of problem solving tools (selecting process metrics, consistent pareto tracking). Some team engagement where front-line staff participate in the KPI tracking and problem solving.	Process Obs boards present in majority of departments with a KPI board and updated daily	Gemba walks exist at appropriate cadence; Consistent Gemba Walkers scheduled for several consecutive walks; defined roles of the walker group (scribe, timer, 1st coach, 2nd coach)	Tiered Huddles occurring Daily (M-F), with occasional weekend/holiday coverage. Tiered Huddles present in majority of departments and their leaders. Some escalations are occurring.	Active Rapid cycle improvement occurring, regularly (at least x1 per quarter)	Lean Roadmap is updated within last quarter	Leader Standard Work is the primary tool leaders use to manage their day-to-day	Team meets monthly to review progress and demonstrate basic understanding of the process	Teams meet monthly to review progress and demonstrates basic understanding of the tracking and countermeasure process
Present	KPI boards exist(s). Regular, appropriately cadenced huddles and prepared to present during Gemba walks; teams demonstrate basic understanding of process	Process Obs exists in some departments	Gemba walks occur	Tiered Huddles exist in some departments and with some leaders	Rapid cycle improvement activities occur occasionally at site	Lean Roadmap exists	Leader Standard Work exists in pockets	X-matrix exists	Operational Excellence and/or Performance Close Dashboard exists. Team familiar with Performance Close Metrics
Not Present	No Lean Daily Management (LDM) structure exists	No Process Obs exists	Gemba walks do not occur	Tiered Huddles do not exist	No rapid cycle improvement activities occurred in last 6 months or scheduled for immediate future	Lean Roadmap does not exist	No evidence of Leader Standard Work existing	No evidence of formal Breakthrough Goal Deployment process	No evidence of tracking key operational metrics on a monthly basis

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MANAGEMENT SYSTEM ASSESSMENT TOOL
TIERED HUDDLES

Not Present	Present	Basic Application	Proficient	Ideal
Tiered huddles do not exist	Tiered Huddles exist in some departments and with some leaders	Tiered Huddles occurring Daily (M-F), with occasional weekend/holiday coverage. Tiered Huddles present in majority of departments and their leaders. Some escalations are occurring.	Tiered Huddles being utilized daily (including a modified weekend/holiday process). Safety concerns, good catches and recognition are escalated appropriately. Clear differentiation between "for awareness" and "for escalation" exists with clear documentation for "escalations." Some feedback to staff is occurring related to escalated items.	Tiered Huddles being utilized daily (including a modified weekend/holiday process). Safety concerns, good catches and recognition are escalated appropriately. Follow-ups/resolution is completed and documented by leadership. Information/Feedback is consistently cascaded down. All areas are represented at Tiers 2, 3, 4, and 5 by the area leader or a delegate. Discussion is 80% look forward and 20% look back. All Tiers complete their huddles within 20 minutes.

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MANAGEMENT SYSTEM ASSESSMENT TOOL
SCORING

About the Scoring

- Intentional avoidance of numerical scoring with customers
- Master document owned by LPO with all site's scores
- Scores blinded from one another

Acting Upon Results

- With coaching from LPO, sites self-manage their lean roadmap development
  - Self-selection in areas of focus enhances operators' engagement

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MANAGEMENT SYSTEM ASSESSMENT TOOL
TIERED HUDDLES

Not Present	Present	Basic Application	Proficient	Ideal
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FY24 Baseline ●●●●●	●●●	●●●●●●●		
FY24 EOY Target		●	●●●●●●●●●●●●●	●

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MANAGEMENT SYSTEM PROGRESSION - SELF-ASSESSMENT

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MANAGEMENT SYSTEM ASSESSMENT TOOL
CONNECTION TO ACCOUNTABILITIES

LPO Sr. Director Accountability

% Weighting	Accountability	Accountability Category	Below Expectations	Successful Year	Exceptional Year
30%	**Support the organization in adoption of foundational lean elements and behaviors through coaching, advising, and influencing organizational leaders.** • Advance organization's **understanding of the ideal** management system • Coach, advise, and influence system leaders in the **adoption of management system components** including Lean Daily Management, Process Observation, Leader Standard Work, tiered huddles, department dashboards, Goal Deployment (Performance Close and Breakthrough) • Support building our culture of improvement, engagement and continuous learning through **building and refining** components of the management system	Operational Excellence Management	No management system progression. Failed to track progression of management system.	Lean roadmaps updated and reviewed with care site executives describing progression of foundational management system components. Update and execute on system lean roadmap with clear indicators of system-wide management system progression. Progressed in key elements of management system as defined by MSAT score improvement from 1.47 to 1.59 by June 30, 2024.	Lean roadmaps updated and reviewed with care site executives describing progression of foundational management system components. Update and execute on system lean roadmap with clear indicators of system-wide management system progression. Progressed in key elements of management system as defined by MSAT score improvement from 1.47 to 1.73 by June 30, 2024.

Hospital President Accountability

% Weighting	Accountability	Accountability Category	Below Expectations	Successful Year	Exceptional Year
15%	**Demonstrate measureable progress on Care Site Lean Management System by June 30, 2024**	Operational Excellence Management	Progress net 0 steps towards Ideal on MSAT	Progress net ≥3 steps towards Ideal on MSAT	Progress net ≥5 steps towards Ideal on MSAT

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MANAGEMENT SYSTEM ASSESSMENT TOOL
THE ORGANIZATIONAL BENEFIT

- Increased accountability created pull for the team
- Targeted Roadmap development
- Providers clarity for onboarding new leaders
- Results drive local and system-wide improvements
- **Stronger leaders, stronger culture, and improved organizational results**

Metric		Apr	May	Jun	July	Aug	Sept	Oct	Nov	Dec
Management System Progression (scale of 0-4)	Target	1.41	1.43	1.45	1.47	1.49	1.51	1.53	1.55	1.57
	Actual	1.41	1.47	1.47	1.54	1.57	1.64	1.65	1.67	1.64

2023 Results

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Defining Ideal:
Leadership Behaviors

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THE PROBLEM TO SOLVE

| Align Leader Behaviors with Desired Performance | Clarity on Ideal Behaviors | Variation in Leader Development |

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"For **69%** of people, their manager has **MORE** impact on their mental health than their therapist or doctor – and it's equal to the impact of their partner"
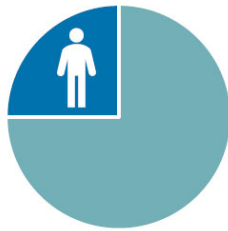
Nearly **25%**
of an **employee's well-being**
can be accounted for by their
manager

Managers Have Major Impact on Mental Health: How to Lead for Wellbeing, Forbes 2023
WRAW Resilience Report, 2022

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LEADER BEHAVIOR ASSESSMENT TOOL (LBAT)

OBJECTIVES

1 Clearly define 'what good looks like' (ideal behaviors) for each leadership capability & connected lean principle

2 Create a self-assessment tool that allows leaders to more objectively assess where they are today

3 Act as an input for Individual Development Plans (IDPs) and Performance Reviews

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LAUNCHING THE LBAT

| Create Tool | Establish Resources To Support Gap-Closure For End User | Partner & Align With Talent Mgmt & Org. Effectiveness Team | Pilot Tool In Diverse Leadership Group | Improve Based on Feedback | Launch LBAT Through Lean Leader Series Live Course |

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LEADER BEHAVIOR ASSESSMENT TOOL
HOW THE TOOL WORKS

Connects **9** Lean Principles to **3** OhioHealth Leader Capabilities

PEOPLE DEVELOPER	CULTURE BUILDER	RESULTS DRIVER
Engage & Empower Those Closest to the Work Active Listening Respect Every Individual Lead with Humility Leader as Teacher	Change Management "Above the Line" Mindset	Continuous Improvement Drive Process Efficiencies Think Strategically

Mastered Skill & Can Teach Others

Developing & Actively Progressing

Not Present or Progressing

Self-assess progression on specific behaviors or skills within each leader principle using a standard 3-tier categorization

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LEADER BEHAVIOR ASSESSMENT TOOL
NAVIGATING THE TOOL

Purpose & Standard Work

Connections to Existing Leader Capabilities

Lean Leader Principles
+ Helpful Definitions to Orient to the Behaviors Listed Below

Behaviors to Consider & Evaluate
"What good looks like"

How to Gauge Progress in Each Behavior Box
(Color Code)

Assessment Summary & Development Notes

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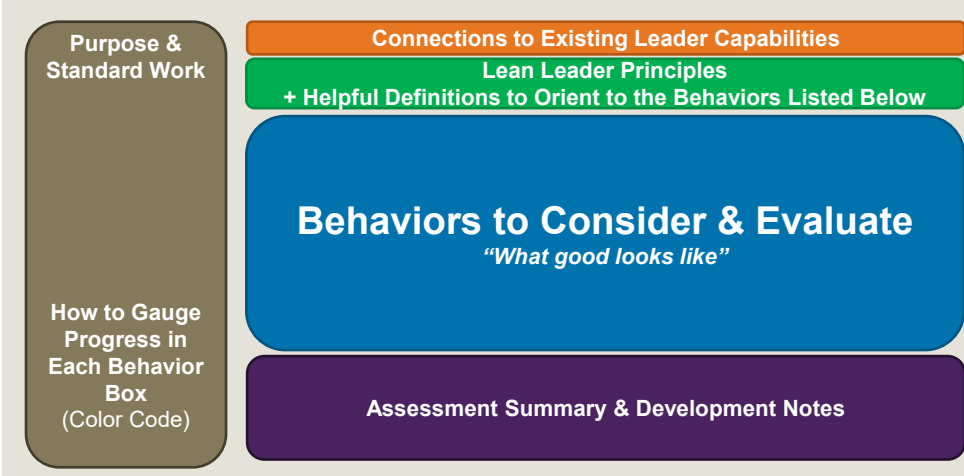
LEADER BEHAVIOR ASSESSMENT TOOL - LBAT

LEADER BEHAVIOR ASSESSMENT TOOL

PURPOSE:
Use this tool to assess your Leadership Behaviors and develop a clear path to improve.

UTILIZATION GUIDE:

1. For each Behavior, review "What Good Looks Like" and asses yourself based on this year's performance.

   Color code each cell using the **Blue/Green/Yellow** scale below.

2. Using your individual assessment of each behavior, complete the Assessment Summary for each Leadership Principle.

3. Use this assessment as an input to your Individual Development Plan, as well as a discussion guide between you and your leader throughout the year.

* **Represents HRO Leadership Connections**

	Leadership Capability:	PEOPLE DEVELOPER					CULTURE BUILDER		RESULTS DRIVER		
	Lean Leadership Principles:	Engage & Empower Those Closest to the Work	Active Listening with an Open Mindset	Respect Every Individual	Lead With Humility	Leader as Teacher	Change Management	"Above the Line" Mindset	Continuous Improvement	Drive Process Efficiencies	Think Strategically
	Leadership Competency Connection:	Team Developer	Communication; Servant Leadership	Servant Leader	Servant Leader	Mentor and Coach	Leading in the Gap	Continuous Learning; Emotional Intelligence	Lean Innovation/Op Ex	Lean Innovation/Op Ex	System Agility; Communication
	Definition	Trusting your associates is the foundation for a strong culture. As associates feel heard and trusted, they become empowered to make change and will feel comfortable raising awareness to areas of opportunity.	Active listening requires an open mind. As a listener and a leader, be open to new ideas, new perspectives, and new possibilities when practicing active listening. Even when good listeners have strong views, they suspend judgment, hold any criticisms, and avoid arguing or selling their point right away.	Primary focus is on the growth and well-being of others; placing the needs of others first and helping people develop and perform as highly as possible.	Humility is an enabling principle that precedes learning and improvement. A leader's willingness to seek input, listen carefully and continuously learn creates an environment where associates feel respected and energized and give freely of their creative abilities.	Effective leaders understand current gaps in both associates' knowledge and performance, acting as a mentor/teacher in helping their associates close identified gaps.	Prepare, support, and help individuals, teams, and organizations in making organizational change.	The line signifies a choice between how you thoughtfully respond to a situation or automatically react. Operating above the line is open and positive. It's about ownership, accountability and responsibility. Operating below the line is closed and negative.	Innovation and improvement are the consequence of repeated cycles of experimentation, direct observation and learning. A relentless and systematic exploration of new ideas, including failures, enables us to constantly refine our understanding of reality.	All outcomes are the consequence of a process. It is nearly impossible for even good people to consistently produce ideal results with a poor process both inside and outside the organization. There is natural tendency to blame the people involved when something goes wrong or is less than ideal, when in reality the vast majority of the	Through understanding the relationships and interconnectedness within a system we are able to make better decisions and improvements.
	Behavior ("What good looks like") (color code each cell using the scale below)	Understand associates goals/IDPs (Individual Development Plans) and intentionally provide development opportunities aligned with goals or career aspirations	Maintain eye contact with individuals as they speak	Create a development plan for direct reports including appropriate goals	Consistently and predictably show up where the work happens by going to gemba ("where the work happens")	Actively assesses each person's strengths and developmental needs to provide challenging and meaningful work	Identify the groups and people who will be impacted as the result of the project, and in what ways their work will need to change	Self–awareness of where you are and adjusting behaviors accordingly	Understand current performance gaps that exist by leveraging operational excellence connectivity tools (Department Dashboard, Op, Ex, Leading Indicators, visual management)	When an error occurs, focus on improving the process (not person) that created the error. Ensure Just Culture	Provide clear connectivity between individual's daily tasks to department and system performance
		Ensure your team has the training and education they need to be successful	Allow individuals to fully complete their thought/sentence before reacting (verbally or non-verbally), leveraging Humble Inquiry.	Regular 1:1 meetings with direct reports	Do less telling; more listening in your conversations	Empowers others to reach their own solutions and potential through coaching	Create a customized plan for ensuring impacted employees receive the awareness, leadership, coaching, and training they need in order to change successfully	Recognizing where others around you are and adapting behaviors accordingly	Follow & coach to a structured approach to solving problems (A3 mindset) – Promote Daily Problem Solving	Ensure repeatable processes have standard work in place that can be easily followed, is readily accessible, and routinely utilized	Ensure the goals and issues for each day are understood by those who are affected (huddles, tiered huddles, operational side of KPI board)
		Involve teams in improving the work done in their areas (KPIs, LDM, A3s, Kaizen)	Listen to understand (not listening to respond) from the perspective of the associate, fostering an environment that withholds judgment	Routinely seek the team's expertise and experience as a critical first input/decision point for improvements within their work	Consistently leverage Humble Inquiry (non-leading, curious, open–ended questions) in discussions (in *and* out of Gemba)	Grow others as high-potential associates/leaders to identify and prepare leaders of tomorrow (e.g. succession planning, stretch assignments)	Effectively communicate the 'why' and the 'what' when initiating and rolling out changes, and create avenues for feedback and confirmation of understanding	Be open-minded; positive; curious; creative; listening; innovative; try new approaches	Encourage associates to explore new ideas without fear of failure	Implement highly effective countermeasures and action plans that do not rely solely on education, memory, vigilance, or simply working harder	Coach teams to understand the impact their work has on other departments within the system that are their customer
		Create and enable a high–performing culture where each associate can practice at the top of their talent	Reflect on what was shared Clarify any questions you may have Summarize what you heard Share your reflections on what you heard	Continually provide coaching for problem solving and development Use Case Scenarios for "In the Moment" Learning Provide 5:1 Feedback	Allow an open door where associates can report issues with confidence with a positive response (Create a Safe Space to Speak Up) Regular self-reflection following interactions with associates and other leaders	Reinforce with 4C Rounding		Share Moments that Matter	Encourage team to leverage KPI Paretos to drive action plans, and iterate using PDSA cycles	Eliminate excess or waste by optimizing our daily processes and supporting resources. Ensure the resources that are needed are available when required, and escalated when necessary	Understand system strategy and employ tactics for success, when applicable (e.g., Goal Deployment Focus Area)

Assessment Summary (Count the number of behaviors in each Lean Leadership Principle for each element of the scale):

Mastered Skill & Can Teach Others (Mastered "what good looks like" and is able to develop others in this category)	Mastered & Can Teach	Mastered & Can Teach	Mastered & Can Teach	Mastered & Can Teach	Mastered & Can Teach	Mastered & Can Teach	Mastered & Can Teach	Mastered & Can Teach	Mastered & Can Teach	Mastered & Can Teach
Developing & Actively Progressing (Intentional efforts and progress toward "what good looks like")	Developing & Progressing	Developing & Progressing	Developing & Progressing	Developing & Progressing	Developing & Progressing	Developing & Progressing	Developing & Progressing	Developing & Progressing	Developing & Progressing	Developing & Progressing
Not Present or Not Progressing (Does not exhibit routinely and not actively working toward "what good looks like")	Not Present or Progressing	Not Present or Progressing	Not Present or Progressing	Not Present or Progressing	Not Present or Progressing	Not Present or Progressing	Not Present or Progressing	Not Present or Progressing	Not Present or Progressing	Not Present or Progressing

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LEADER BEHAVIOR ASSESSMENT TOOL
HOW THE ASSESSMENT WORKS

Enroll in Leader Behavior Course → Attend 4 Hour Live Course with Peers & One-Up → Complete First Self-Assessment Using the Tool → Review Self-Assessment with One-Up Leader → Develop Individual Development Plan from Identified Gaps → Save Tool to Review Progression at Set Cadence → Leverage Tool During Annual Performance Reviews

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LEADER BEHAVIOR ASSESSMENT TOOL
ASSESSMENT

About the Assessment

- Intentional focus on developmental categories
- Assessment results owned by leader
- Tool designed as living document with visible progression

- Leader reviews self-assessment with One-Up to help identify blind spots
- One-Up supports leader's Individual Development Plan
- Leader initiates cadence of self-review
- Leader leverages tool in their performance review

Acting Upon Results

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LEADER BEHAVIOR ASSESSMENT TOOL
THE ORGANIZATIONAL BENEFIT

THIS ACTIVITY PROVIDED ME WITH NEW INFORMATION (OR CLARIFIED EXISTING INFORMATION)
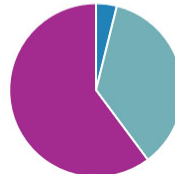
Associates experience consistent and engaged leaders

Clear tool for leaders joining the organization or progressing into leadership role

Clear way to identify talent and leverage mentoring capability

Stronger leaders, stronger culture, and improved organizational results
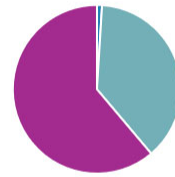
I INTEND TO USE WHAT I LEARNED FROM THIS ACTIVITY

■ Strongly Disagree ■ Disagree ■ Neutral
■ Agree ■ Strongly Agree

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LEADER BEHAVIOR ASSESSMENT TOOL
FOR YOUR ORGANIZATION

ON YOUR HANDOUT:

1. Document or Define Your Organization's **Key Leadership Capabilities** or Pillars

2. Document Which **Lean Principles** Fall Under Each Key Leadership Capability

3. Define **Specific Behaviors** You Would Like to See Exhibited by Your Leaders, Within Each Principle

4. Determine How You **Measure Progression**

LEADERSHIP CAPABILITIES	1.		2.		3.	
LEAN PRINCIPLES	1.	2.	1.	2.	1.	2.
LEADERSHIP BEHAVIORS	1.	1.	1.	1.	1.	1.
	2.	2.	2.	2.	2.	2.
	3.	3.	3.	3.	3.	3.
	4.	4.	4.	4.	4.	4.

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QUESTIONS?

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