

# Knowledge Retention

March 6, 2018

Presenting To

APHL Quality Improvement Forum

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ARIZONA DEPARTMENT  
OF HEALTH SERVICES

*Health and Wellness for all Arizonans*

# Knowledge Retention

- Knowledge Retention Toolkit
  - Attended Oct 2016 QIF call and pulled toolkit
  - Got the conversation started
- Started in Feb 2017
  - Still going – almost complete with project and moving into sustainability
  - Brought intern onboard from Jun to Dec 2017 to help move project





# How to get started?

- What is the best way to get everyone on board with this project (management and staff)?
- What is the best approach?
- I have tools, which ones will get me to the goal?
- Frequency of meetings/discussions/updates?



# Lean Tools

- Arizona Management System (AMS)
  - Huddles/PVDs
  - Metrics
  - Gemba walks
  - Leader Standard Work
  - A3 is a standard, clear and concise format for communicating project information fit onto one 11x17 page

Leader Standard Work - Kathryn Wingness, Office of Laboratory Services - Jan 2012

Date	Status	Action Item
1/15/12	Not Started	1.0 Purpose
1/15/12	Not Started	2.0 Current Situation
1/15/12	Not Started	3.0 Problem Statement
1/15/12	Not Started	4.0 Root Cause Analysis
1/15/12	Not Started	5.0 Countermeasures
1/15/12	Not Started	6.0 Standardization



<b>Project Name:</b> Facilities Knowledge Management	<input checked="" type="checkbox"/> Improvement <input type="checkbox"/> Breakthrough	<b>Agency Name:</b> Laboratory Services/Facilities	<b>Date:</b> 03.01.2018
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<b>Organization/Resources:</b> Victor Waddell (Sponsor), Steve Baker (Owner), Kathryn Wangsness (Lean Coach/Member), Rick Davis (member), Leslie Reeves (member), Lawrence Bruce (member), Brian Baker (past member/intern)	<b>Meeting Cadence:</b> Weekly huddle Wed @ 8am
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PURPOSE (PLAN)	STRATEGY (DO)
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**Problem Statement:**  
By the end of 2018, 2/3 of the Lab Facilities team plans to retire affecting knowledge transfer among the Lab Facilities team and daily facilities operations of ASPHL.

Gemba walks were performed by owner, lean coach and intern to determine key activities and prioritize recording these activities.

**Scope:**

<b>In:</b>	<b>Out:</b>
<ul style="list-style-type: none"> <li>Review of all processes via Gemba</li> <li>Documentation via written, recorded</li> <li>Updates to MVP system</li> <li>Changes to responsibilities</li> <li>Changes to workflow</li> </ul>	<ul style="list-style-type: none"> <li>Hiring additional staff</li> </ul>

#	Actions	Owner	Due Date	Action Status
1	Review electronic and hard copy records filing system	Rick/Les	9/8/2017 - DONE	Created shared drive on 3/2/17 Hard copy files organized
2	Review MVP system and ensure equipment is current	Les/Brian	8/27/2017 - DONE	Completed, see note regarding sustainability
3	Perform Gemba walks to determine key activities – ensure this activity is added to LSW	Steve/Les	3/9/2018	Ongoing activity, part of LSW – add to Les' LSW
4	Create draft documented processes (Std work, SOP, flow charts, etc)	Brian	12/22/2017 - Done	Completed and awaiting final reviews – see list
5	Review draft documents then finalize via Lab QA-019	QA Team – final review	3/30/2018	In progress, working with QA staff to move forward. see SW Review Check sheet
6	Perform 5S (Workplace organization) on common areas (Shop, Back room, Penthouse)	Lab Facilities team	3/30/2018	Shop completed, back room and penthouse in progress – see Problem Register
7	Perform 5S on individual offices	Rick/Les	1/12/2018 - Done	Completed, going forward use of 5S checklist or Gemba walks to ensure sustain

**Goal Statement:**  
Create a minimum document process for key activities performed by the Lab Facilities team by Feb. 2018.

ANALYSIS (PLAN)
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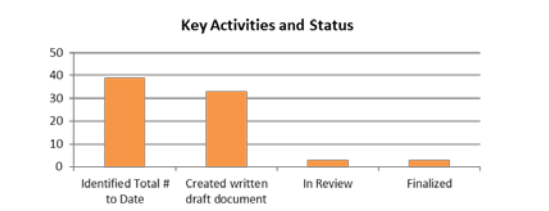
Each staff member on the Lab Facilities team serves a role and the newest team member has been with the Lab for 7 years and has learned many of the processes over the years. When 2/3 of the team members started, the building was still new and there were many changes made to create greater efficiencies. As the team members worked through the various changes they learned how to ensure the work was completed. However, when a team member was on vacation or gone, certain activities would not get completed as the other team members did not know how to perform or it was felt that it could wait until the return of the team member that routinely performed the task. Due to the workflow and the lack of documented processes, activities would occasionally get missed or would not be performed consistently between the staff. A review of current activities must occur and be documented in a way that works for the staff in the section and allows for the transfer of knowledge.

RESULTS AND ISSUES (CHECK)
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- ✓ Established a shared electronic drive for common records that all Lab Facilities staff can access
- ✓ Hard copy files were reviewed and files updated and labeled
- ✓ 5S performed on common work areas: Shop, back room, penthouse



- Review:**
- Activities performed by Lab Facilities and identify key tasks (Gemba walk)
  - MVP system to determine if there are options that would assist in knowledge sharing
  - How information is stored (electronically and hard copy)
  - Contacts for specific tasks needed to be performed for the building (e.g. ADOA, Johnson controls)
  - Work order process – discovered that work orders were behind by about 6 months equating to over 600 work orders not updated



- Potential root causes:**
- Longevity of the current staff and their familiarity with the building, the processes, and each other
  - No documented processes on work performed
  - No regular system in place to ensure work completed

STANDARDIZE AND SUSTAIN (ACT)
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- Weekly huddle meetings by the Lab Facilities team will ensure that activities identified for knowledge sharing and improvement are sustained
  - Gemba walks by Owner
  - 5S Checklist review – periodically performed to verify sustain
  - Consistent use of FFAC-001 Equipment Modification Form (use of this will ensure MVP is up to date with equipment)
- Training and VOC to encourage use of FFAC-001 Equipment Modification Form
- Provide training and ensure that Gemba walks are part of supervisor LSW
- Provide training on 5S follow up checklist and best practice frequency to sustain

# Happy Ending

- Sustainability in the future
  - Management engaged and discussions happening weekly
  - First employee retired 02.23.2018
- Initially there was grumbling but over time staff appreciated the effort
  - “helpful to have these in place”



# THANK YOU

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