

Huddles and Dashboards:

- **Optimizing Team Performance and Collaboration**
- **Maximizing Efficiency with Structured Meetings and Data Insight**

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Agenda

- Introduction to Intermountain Health
- Baseline HTM Program Elements
- Understanding a Dashboard
- Dashboard Examples
- Understanding Huddles
- Huddle Board Examples
- Using Dashboard and Huddle Together
- Continuous Improvement
- Questions



Intro to Intermountain Health



6 Primary States
(UT, NV, ID, CO, MT, WY)



33 Hospitals
400 Clinics



179 CE/HTM
Caregivers



Select Health
1.1 million Members



200,000+
Asset Inventory



4,800
Licensed Beds



20+ Airbases
40+ Aircraft



\$16.06 billion
Total Revenue

Baseline Program Requirements and Objectives

Patient Safety

Regulations

Standards

Stewardship



Goal Alignment

Engagement

Improvement

Satisfaction

Understanding Dashboards

Definition – Provides a visual picture of key metrics, data, and performance indicators for technicians, teams, and leadership.

Purpose

- Centralizes the data in one place for access and understanding
- Allows monitoring of current and real-time data against targets
- Provides vision and awareness for decision making

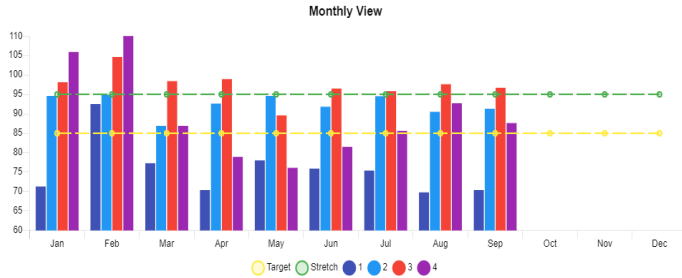
Important Parts of a Dashboard

- Key Performance Indicators (KPIs)
- Visual Data for Review (Charts, Graphs, Tables)
- Customization Filters
- Automated Updates to Data

Dashboard Data Examples

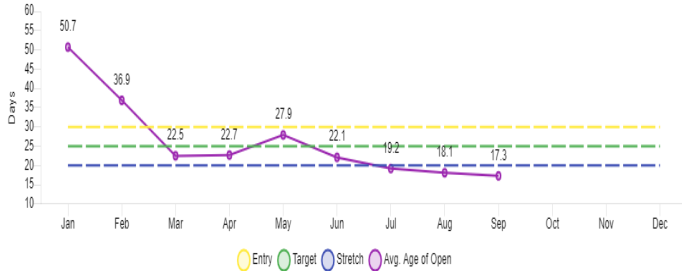
Caregiver Documented Time

Entry 80% Target 85% Stretch 90%



Average Age of Open Work Orders (Days)

Entry 30 Target 25 Stretch 20



PM Completion by Hospital

Facility	PM Compliance	PM Due	PM Completed	PM Incomplete	Could Not Locate	PM Late/Early	PMs On Time Completion %
Hospital 1	MET	349	349	0	5	0	100.00
Hospital 2	MET	253	246	7	4	0	97.23
Hospital 3	MET	18	18	0	0	0	100.00
Hospital 4	MET	49	49	0	1	0	100.00
Hospital 5	MET	65	65	0	1	0	100.00
Hospital 6	MET	4	4	0	0	0	100.00
Hospital 7	MET	169	169	0	4	0	100.00
Hospital 8	MET	2	2	0	0	0	100.00
Hospital 9	MET	928	910	18	10	0	98.06
Hospital 10	MET	68	67	1	0	0	98.53
Hospital 11	MET	248	248	0	7	0	100.00
Hospital 12	MET	367	366	1	0	1	99.73
Hospital 13	MET	148	148	0	0	0	100.00
Hospital 14	MET	465	465	0	6	0	100.00
Hospital 15	MET	783	776	7	16	0	99.11
Hospital 16	NOT MET	161	130	31	9	0	80.75
Hospital 17	MET	196	196	0	5	0	100.00
Hospital 18	MET	32	32	0	0	0	100.00
Hospital 19	MET	249	249	0	9	0	100.00
Hospital 20	NOT MET	32	29	3	0	0	90.63
Hospital 21	NOT MET	259	170	89	9	0	65.64
Hospital 22	MET	1039	1039	0	6	0	100.00
Grand Total	MET	5884	5727	157	92	1	97.33

PM Data by Caregiver

Hospital 21	Name	PM Compliance	PM Due	PM Completed	PM Incomplete	PM Valid	PM Not Found	PM Late	PM Valid %
2021 / 10	Caregiver A	NOT MET	122	33	89	33	0	0	27.0
	Caregiver B	NOT MET	82	82	0	76	6	0	92.7
	Caregiver C	NOT MET	49	49	0	46	3	0	93.9
	Caregiver D	MET	1	1	0	1	0	0	100.0
	Caregiver E	MET	5	5	0	5	0	0	100.0

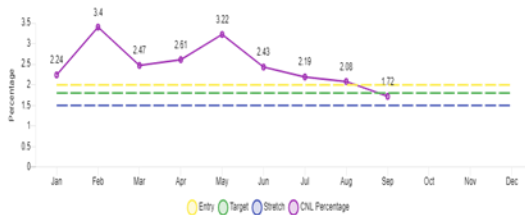
Continious Improvement – Dashboard

- **Example of “Could Not Locate” Equipment**
 - Monthly report on the dashboard
 - Automated weekly update
 - Tracked at system, local, and technician level
 - Many times competition drives results

CNL Data by Hospital

Facility	WOs Completed	CNL YTD	CNL % YTD	CNL Prior Year	CNL % Prior Year	CNL Projected Current Year
Hosp 1	2864	48	1.7%	32	0.9%	57
Hosp 2	2351	52	2.2%	43	1.8%	61
Hosp 3	451	8	1.8%	7	1.5%	9
Hosp 4	1016	14	1.4%	16	1.4%	17
Hosp 5	1002	40	4.0%	1	0.2%	47
Hosp 6	1163	39	3.4%	9	1.0%	46
Hosp 7	86	0	0.0%	4	0.7%	0
Hosp 8	11128	353	3.2%	196	1.7%	417
Hosp 9	837	17	2.0%	18	1.8%	20
Hosp 10	1992	58	2.9%	38	1.7%	69
Hosp 11	3752	76	2.0%	128	3.0%	90
Hosp 12	2896	31	1.1%	35	1.0%	37
Hosp 13	7030	103	1.5%	82	1.1%	122
Hosp 14	6605	60	0.9%	63	0.8%	71
Hosp 15	1900	31	1.6%	101	4.8%	37
Hosp 16	2605	49	1.9%	45	1.6%	58
Hosp 17	699	1	0.1%	0		1
Hosp 18	6218	179	2.9%	138	1.9%	212
Hosp 19	255	0	0.0%	0	0.0%	0
Hosp 20	2397	89	3.7%	115	4.0%	105
Hosp 21	8516	153	1.8%	124	1.3%	181
Grand Total	65792	1401	2.1%	1195	1.7%	1656

Percent of Could Not Locate
Entry 2% Target 1.8% Stretch 1.5%



CNL Data by Caregiver

Name	# of WOs Completed	# of CNL	CNL %
Caregiver A	949	26	2.7%
Caregiver B	539	14	2.6%
Caregiver C	270	12	4.5%
Caregiver D	639	37	5.8%
Grand Total	2397	89	3.7%

Understanding Huddles

Use of a Huddle Board

Purpose

- Visual snapshot of current state
- How are we performing and where do we focus



Understanding Huddles

Definition – A short focused meeting involving members of the team that allows them to sync on progress, identify challenges, and determine priorities.

Purpose

- Keeps teams aligned and updated
- Encourages collaboration and communication
- Used to identify challenges, obstacles, or issues

Best Practices

- Keep it short – 15 minutes or less
- Focus on specific topics or areas of discussion
- Utilize a structured agenda or a huddle board
- Ensure participation by the entire team

Team Huddle – Caregiver Engagement

Same time(s), same place

Duration: 10-15 minutes

Leadership Responsibility

- Ensure huddles occur
- Attend huddles regularly

Choose a huddle facilitator

- Can change for huddles



Review KPIs, metrics, goals

- Meaningful data and reports

Identify gaps (visual)

- Not for problem solving
- Develop return to green

Solicit team for ideas

- Keep track of submissions
- Establish goals and/or metrics

Categorize ideas

- To Do – In Progress – Complete
- Safety Related, Stewardship, Quality, Patient Experience

Understanding Huddles and Huddle Boards

Huddle - Agenda Example

INSTRUCTIONS:

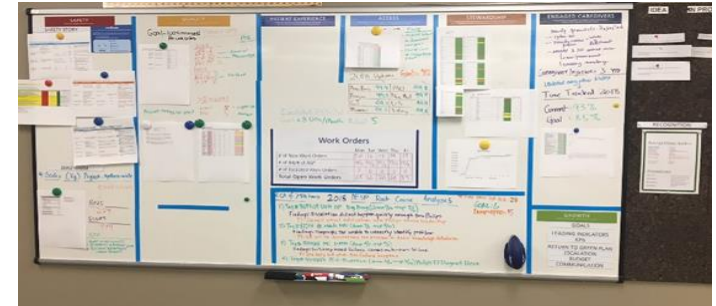
1. Before entering your answers, **SAVE** the file to your hard drive or OneDrive.
2. **Observe** your team's Daily Huddles and answer the evaluation questions.

Measure	Evaluate
Safety Stories	Is the team discussing how they are keeping patients and themselves safe daily? Are recent safety events being discussed for awareness?
Announcements / Misc. Business	Are pertinent announcements being communicated?
Items to Escalate	What types of items is the team identifying as needing to be escalated upwards for assistance or awareness? Is the leader entering items into the CI Portal and reporting to the next tier?
Review Daily Focus	Does the team understand improvement opportunities facing the department? How is the team visually tracking against lead measures in real-time?
Review Action Items	What type of tool is the team using to track follow-up on who is doing what by when?
Recognition	How are this team bragging on one other and recognizing the great work in their department?

What is one opportunity you've identified in this team's Daily Huddle process?

What is one you will adopt from this team's huddle practice for your own team?

Huddle Board Examples



Using a Dashboard and Huddle Together

Dashboards

- Determine KPIs, metrics, tools, and other resources
- Automate data refresh
- Align data with goals and objectives

Huddles

- Determine frequency
- Use factual data from the dashboard
- Ensure information is accurate and current

Combining Dashboards and Huddles

- Data-Driven Discussions: Dashboards will guide huddles and drive focus
- Clear Goals and Accountability: Dashboards make goals visible, and huddles ensure action.
- Increased Transparency: Both promote collaboration and visibility within teams.

Dashboards Support Huddles

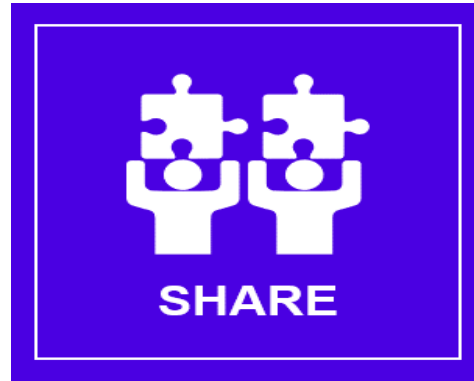
- **How Dashboards Support Huddles:**
 - Provides current and relevant factual data
 - Encourages and supports team discussions
 - Ensures goal progress and performance is visible
 - Tracks trends and provides historical data
 - Keeps assumptions out of the equation and communication



Dashboards Support Huddles



- What needs attention
- Color code items
- Visual display data



- Review the data
- Virtual or in-person
- Invite team members to participate
- Included an *Action Idea Section*



- Drive through change
- Utilize tools and resources
- Improve key results

KPIs, Watch Metrics, Goals, Standardizations

HTM Goals

- A specific endpoint for the department or personnel
- Clearly defined and measurable



KPIs

- Targets impacting strategic department outcomes
- Support the strategy and focus on what's important



Watch Metrics

- Related but not the same as KPIs
- Measure success of department activities
- Impact outcomes, but the most critical measures



Standardizations

- Normalization of disparate processes or technology
- Provides rules, processes, and guidance for conformity



Continuous Improvement - Standardization

Initiative	Significance	Deliverables	Success Criteria
<p>Initiative Name: CE Shared Services contribution “Likely to Recommend” System Leader:</p> <p>Fundamental(s) of Care: Patient Satisfaction</p>	<p>The organization is placing an emphasis on all departments providing a contribution in patient satisfaction through “Likely to Recommend”. This includes CE Shared Services across the system.</p>	<ul style="list-style-type: none"> • Create a script for CE caregivers to utilize when entering a patient room for the service of medical equipment • Train all CE caregivers in the script and document this in their IDP and in WorkDay • Retrain all CE caregivers in AIDET and the 10/5 rule for interaction with patients in our facilities. 	<ul style="list-style-type: none"> • Refine the CE caregivers’ script and document interactions with results • Ensure AIDET and the 10/5 rule can be explained by all CE caregivers • 100% of the training and success stories will be documented.
<p>Initiative Name: Acquisition value range and establishing COSR by site System Leader:</p> <p>Fundamental(s) of Care: Stewardship, Quality</p>	<p>Acquisition value of medical equipment in the system varies based on site and other variables. This creates and issue with benchmarks and metrics for internal and external comparison</p>	<ul style="list-style-type: none"> • Implement a standard report to show acquisition values by medical equipment sub-type, manufacturer, and model • Correct existing issues and validate data integrity in relation to capital acquisition value of equipment • Create Cost of Service Ratio for each site and the imaging multi-vendor service program 	<ul style="list-style-type: none"> • Medical equipment acquisition values standardized within a range based on manufacturer, model, and sub-type • Ability to quickly calculate cost of service ratio and do an internal and external metric comparison
<p>Initiative Name: Implement HTM apprenticeship program across the system System Leader:</p> <p>Fundamental(s) of Care: Access, Stewardship</p>	<p>The healthcare technology management (HTM) industry has created labor practices and knowledge-based items for caregivers. This has been recognized by the National Department of Labor and Intermountain is an approved participant.</p>	<ul style="list-style-type: none"> • Implement the proper practices and documents for Intermountain Healthcare to ensure program compliance • Enroll qualified candidates currently employed by Clinical Engineering Shared Services • Develop an internal list of qualified candidates interested in the apprentice program for future hire into the department 	<ul style="list-style-type: none"> • Successful implementation of all program requirements • All qualified and interested current CE caregivers enrolled in the program • Create a list of at least 10 local candidates interested in enrolling in the HTM apprenticeship program



QUESTIONS?

MD EXPO