Continuous Improvement in Healthcare: A Roadmap for Transformation

November 12 – 13, 2012
InterContinental Hotel and Bank of America Conference Center
Cleveland, Ohio

Featured Speakers

John Shook
Chairman and CEO
Lean Enterprise Institute

Patricia A. Gabow, MD, MACP
Retired CEO
Denver Health

Alice W. Lee
Vice President
Business Transformation
Beth Israel Deaconess Medical Center

Darryl Greene
Executive Director
Continuous Improvement
Cleveland Clinic

Lisa Yerian, MD
Medical Director
Continuous Improvement
Cleveland Clinic

www.cccfme.org/1ClSummit12
OVERVIEW

This conference is focused on learning key continuous improvement methodologies and strategies for organizational success. Many healthcare organizations have begun to apply Lean, Six-Sigma, and other improvement methodologies in pursuit of cultural transformation and more efficient patient care. This conference will bring together healthcare leaders who have cultivated improvement journeys in their own organizations.

We are also offering a non-CME half day Gemba Tour which will take you to key areas of the Cleveland Clinic to see how caregivers are using continuous improvement concepts to improve their work environment and overall patient care.

OBJECTIVES

- Critically review continuous improvement (CI) models, principles, and techniques and describe their application in a healthcare environment;
- Summarize key CI principles, infrastructure, and tools used at the Cleveland Clinic and other healthcare organizations;
- Describe steps to create a CI operating plan and assess organizational capability;
- Create strategies for developing and sustaining a culture of CI in a healthcare organization;
- Compare CI practices and lessons learned in developing a CI plan based on experiences from various healthcare organizations.

TARGET AUDIENCE

This conference is designed for Hospital Leadership (physicians, administration, nursing quality), Continuous Improvement Leaders in Healthcare, Lean Six Sigma Specialists, and other practicing healthcare professionals.
AGENDA
MONDAY, NOVEMBER 12, 2012

7:00 am Registration, Continental Breakfast & Exhibits
Ballroom Assembly Area - 2nd floor

10:55 am Cleveland Clinic’s Continuous Improvement Journey
Darryl Greene and Lisa Yerian, MD

8:00 am Welcome and Introduction
Darryl Greene and Lisa Yerian, MD

11:20 am Lunch

8:10 am Executive Welcome
Robert Wyllie, MD

12:00 pm Panel Discussion: Achieving the Triple Aim
in Healthcare (improve population health, improve
patient experience, and reduce the cost of care)*
Greg Surtman, Facilitator
John Shook
Patricia Gabow, MD
Alice W. Lee
Lisa Yerian, MD

8:15 am KEYNOTE ADDRESS
External Perspective on the Impact of CI in Healthcare
John Shook

8:55 am The Role of Leadership in Systems Transformation
Patricia Gabow, MD

9:45 am Refreshment Break and Exhibits

10:15 am Is There a Roadmap for Transformation?
Alice W. Lee

10:55 am Cleveland Clinic’s Continuous Improvement Journey
Darryl Greene and Lisa Yerian, MD

PLENARY SESSION

11:20 am Lunch

MONDAY, NOVEMBER 12, 2012

1:35 – 2:25 pm Breakout Sessions I

A. Business Review – Strengthening Clinical and Operations Accountability for Better Patient Care
This dynamic healthcare environment demands greater effectiveness in managing the clinical and business side of care delivery. The ability of senior and middle managers to measure their performance coupled with the ability to act on gaps and successes is a recipe for creating a repeatable practice to achieve their goals. This session is designed to share the Business Review practice, how it is implemented and its value towards managing the many facets of patient care.

Darryl Greene
Kimberly Bell
Andrew W. Proctor

B. Cleveland Clinic Approach To Managing CI Project Portfolio
With increasing demands for process improvement across Cleveland Clinic Health System, a robust project management infrastructure is needed to balance demand with limited resource capacity while delivering quality and sustainable results. This session will review our project prioritization and governance process, resource utilization management process, financial impact (ROI) calculation, and standard tools and templates.

Hanh Briggs
Charlie Colosky

C. Implementation and Evolution of an Enterprise-Wide Service Line Performance Management Initiative
Healthcare providers are striving to deliver high quality care at lower cost. While traditional accounting practices present limited visibility to costs incurred throughout a patient’s stay, use of a service-line cost accounting system allowed us to analyze and reduce these costs for specific clinical services. Over 3 years this initiative evolved from a cost reduction initiative to a broad performance management initiative. This session will detail the financial analyses, continuous improvement tools, and challenges and lessons learned through this enterprise-wide program.

Lisa Yerian, MD
Chris Donovan

D. Customer Focus and the Malcolm Baldrige National Quality Award
Learn how Henry Ford Health System obtains information, engages patients and stakeholders to serve their needs and build relationships, and how the System measures customer engagement.

Denise Beaudoin
Sven Gierlinger

E. Designing Lean Processes to Increase Patient Access
Learn how Akron Children’s Hospital is using an Integrated Project Delivery (IPD) process for the re-design of their NeuroDevelopmental Science Center. The goal of this process is to smooth the patient visit process, create flow, and reduce overall appointment length. With changes, a projected modest reduction in appointment time will create capacity for over 2,000 additional appointments annually.

Sherry Valentine

*Approved for ACHE 1.5 Category 1 credit.
# Continuous Improvement Session Schedule

## 3:00 – 3:50 pm  Breakout Sessions II

### F. Productivity Reporting to Manage Labor Costs and Improve Organizational Performance
- Learn how the Management Engineering Department at the Cleveland Clinic helps clinical units manage their labor costs by measuring the time spent by employees on “productive” activities (patient-centric or revenue generating). These measures can accordingly be used to improve performance by adjusting staffing to demand.
- **Presenters:** Michael Rado, Sue Collier, MSN, CNS

### G. Lean at Denver Health: Saving Lives, Saving Money, Saving Jobs
- Participants will hear about Denver Health’s Lean Journey of Transformation, a program which has generated over $167 million in financial impact for Denver Health. Denver Health’s lean initiative for process improvement resulted in Denver Health becoming the first healthcare organization to be awarded the “Bronze Medallion Shingo Prize for Operational Excellence.”
- **Presenters:** Philip H. Goodman, MS, RRT

### H. Physician Engagement in the Continuous Improvement Process
- Learn how Parkview Health has developed a Physician Leadership Institute and created a Lean Skills Lab to educate employees at the “Apprentice,” “Journeyman,” and “Master Craftsmen” levels. Learn how physicians are using Lean to improve inpatient care through collaborative rounding teams and daily huddles.
- **Presenters:** Max Maile

### I. Improving Access by Improving Utilization
- Sharing examples of how the Patient Access challenge facing healthcare can be addressed by improving the utilization of existing resources, both people and equipment.
- **Presenters:** Gina Cronin, Nathan Hurle

### J. Organizational Structure – Neurological Institute Embed Model
- Learn how an embedded resource model for CI implementation and capability build has evolved within the Cleveland Clinic Neurological Institute to support organizational priorities.
- **Presenters:** Michael Modic, MD, Fielding Epstein, Beth Armstrong

## 4:00 – 4:50 pm  Breakout Sessions III

- Cleveland Clinic found a call to action in public measures of quality and safety. Administrative data is a critical source for billing and for measurement of quality and safety. Hospitals must find a cross-functional collaboration among many stakeholders to drive success. Development of an effective cross-functional team is bringing transformation in how patient centered care is approached. This session details an initiative designed to bridge the gap between high quality clinical care and the Documentation, Extraction, and data Reporting Transformation (D.E.R.T.).
- **Presenters:** Shannon Phillips, MD, MPH

### L. Quality and Patient Safety
- An overview of the Quality and Safety structure, goals, data sources, and reporting systems used at Cleveland Clinic. The session will also focus on the design and execution of our enterprise quality improvement strategy and development of our team.
- **Presenters:** J. Michael Henderson, MD, Guido Bergomi

### M. Continuous Improvement in Supply Chain Management
- Learn how Cleveland Clinic’s Supply Chain Management function utilizes continuous improvement systems and tools to provide services to both clinical and administrative areas to enable all caregivers to pursue the delivery of better care... every day.
- **Presenters:** William Donato, Daniel Kubiak, Carol Harding

### N. Patient Experience at the Cleveland Clinic
- Discover how Cleveland Clinic is committed to improving the overall experience for our patients. Hear about how our 42,000 caregivers around the world were aligned around the Clinic’s vision, mission, and values to create higher employee engagement in the care and service to our patients through our Cleveland Clinic Experience learning sessions. By setting higher expectations for our caregivers and providing the systems and tools to meet those expectations, we’ve been able to live up to our guiding principle - Patients First.
- **Presenters:** James Merlino, MD

### O. Using the Healthcare Value Network’s Shingo Prize Model to Assess and Accelerate Continuous Improvement at Christie Clinic
- Learn how Christie Clinic became the first Healthcare Value Network member organization to “jump into” the organizational assessment process and how they received valuable feedback from pumpkins that enabled them to accelerate on their lean journey.
- **Presenters:** Jason Hirsbrunner

## Closing Arrangements

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<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Presenter(s)</th>
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<tbody>
<tr>
<td>4:50 pm</td>
<td>Closing Remarks</td>
<td>Darryl Greene</td>
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<td>5:00 pm</td>
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<td>5:00 – 6:30 pm</td>
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Optional Gemba Tour  
(Non CME)  
8:00 am – 12:00 noon  
Fee: $175

Hearing about Continuous Improvement is great – seeing it is better.
Participants in this non-CME half-day gemba tour will be able to choose any 3 of the following 6 sites to see how caregivers are using continuous improvement concepts to improve their work environment and overall patient care. Participants will be escorted by a Cleveland Clinic “Gemba Guide” to and from each site.

In order to maximize the learning experience, groups will be limited in size. Please select the 3 sites you wish to visit. Once a site has been filled, it will be closed for selection.

The sites are:

**Heart and Vascular Institute**
Visit the #1 ranked Heart and Vascular Center in U.S. News and World Report’s Annual Best Hospitals for the past 18 years.
During the gemba visit you will see:
- Cleveland Clinic’s Invasive Cardiology Lab, a department of Cardiovascular Medicine within the Heart and Vascular Institute;
- A daily visual management process and display board that serves as a central communication point;
- Visual management process related to informed consent adherence;
- Output of a data collection system developed to deliver on the aforementioned daily management system.

**Emergency Department - Split Flow Implementation**
During the gemba visit you will see:
- Split flow model overview with standardized areas, roles, and responsibilities;
- Triage process that splits the patient population into two equally important value streams;
- Improved room utilization using a “no bed owned” philosophy and results waiting area;
- Continuous improvement of the split flow model due to department conditions and/or organizational changes.

**Supply Chain Service Center**
During the gemba visit you will see:
- A state of the art Service Center that combines five departments: Linen, Central Services, Environmental Services, Patient Food & Nutrition, and Storeroom with the Warehouse Management System and Automated Guided Vehicles (AGVs);
- The combination of these functions in conjunction with the AGV technology allow for optimal resource utilization, streamlined delivery processes, and the efficient and effective flow of materials to and from departments;
- Visitors will see the AGV’s in action and see and hear about the visual management tools put in place by storeroom personnel to continually improve their operation.

**Cleveland Clinic Laboratories**
During the gemba visit you will see:
- An inventory management system premised on kanban with the addition of technology in the form of handheld barcode scanners and a computerized inventory system;
- “Close-at-hand” lab bench design featuring flexible workstations with utilities (ie: power, gas, data, and phone) routed through low-profile chase walls;
- Gold LEED (Leadership in Energy and Environment Design) Certified facility.

**Inpatient Responsiveness Improvement Process**
During the gemba visit you will see:
- Rounding/Responsiveness documentation utilized as part of the Health Unit Coordinator (HUC) introduction and orientation for patients;
- Process scorecard containing key daily input metrics – locators worn/functioning, patient-caregiver assignments made, calls over-target, HUC patient introductions conducted;
- Log/escalation processes for calls over-target;
- Documentation to orient “float” personnel to our process standards/expectations.

**The Cleveland Clinic Experience**
During the gemba visit you will:
- Hear how the Cleveland Clinic shared its Mission, Vision, Values and Expected Services behaviors to 42,000 employees during an 18-month period of time;
- Experience what participants in the 3.5 hour training session experienced through the use of a visual learning map;
- Learn why all employees are considered “Caregivers.”
GENERAL INFORMATION

LOCATION
InterContinental Hotel and Bank of America Conference Center
9801 Carnegie Avenue
Cleveland, OH 44106
Phone: 216.707.4100 or 877.707.8999

HOTEL ACCOMMODATIONS
A block of rooms has been reserved at the InterContinental Hotel for a special rate of $169 single/double (plus tax). To obtain this special rate, you must make your reservation by 5:00 pm ET on October 10, 2012. To make your reservations, contact the Hotel Reservations Department at 216.707.4100 or 877.707.8999. Please identify yourself as being with the Cleveland Clinic Continuous Improvement in Healthcare Course and refer to booking code UJ2.

GROUND TRANSPORTATION
Taxi service is available from Cleveland Hopkins International Airport to the InterContinental Hotel and Bank of America Conference Center.

INFORMATION
For further information about this conference, contact the Cleveland Clinic Center for Continuing Education at:
Local: 216.448.0770
Toll Free: 800.238.6750
Web Address: www.ccfcme.org/1CISummit12

REGISTRATION AND CANCELLATION
Preregistrations are accepted until 2:00 pm ET November 9, 2012. Please register on-site after this date. In case of cancellation, a full refund will be made if canceled by November 1, 2012. After November 1, 2012, a $50 cancellation fee will be deducted from your refund. Written notification of your cancellation is required to process your refund. NO REFUNDS WILL BE ISSUED AFTER NOVEMBER 30, 2012.

For questions about registration, call 216.448.0777 or email us at cmeregistration@ccf.org

PARKING
Parking is available in the East 100th St./Carnegie Visitor’s Parking Garage at prevailing rates. Valet parking is available at the hotel for an additional charge.

ACCREDITATION
The Cleveland Clinic Foundation Center for Continuing Education is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians.

The Cleveland Clinic Foundation Center for Continuing Education designates this live activity for a maximum of 7 AMA PRA Category 1 Credits™. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

Participants claiming CME credit from this activity may submit the credit hours to the American Osteopathic Association for Category 2 credit.

The Ohio Board of Nursing will accept at face value the number of contact hours awarded for an educational activity that has been approved for CE by a nationally accredited system of CE approval. Therefore, the 7 AMA PRA Category 1 Credits™ will be accepted for nursing credits.

Approved for 1.5 hours of American College of Healthcare Executive Category 1 credit (Achieving the Triple Aim in Health Care Panel Discussion – 12:00 pm – 1:30 pm).

FACULTY DISCLOSURE
The Cleveland Clinic Foundation Center for Continuing Education has implemented a policy to comply with the current Accreditation Council for Continuing Medical Education Standards for Commercial Support requiring resolution of all faculty conflicts of interest. Faculty declaring a relevant commercial interest will be identified in the activity syllabus.

AMERICANS WITH DISABILITIES ACT
The Cleveland Clinic Foundation Center for Continuing Education fully intends to comply with the legal requirements of the Americans with Disabilities Act. If you need assistance, please notify us at least two weeks prior to the activity.
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**REGISTER ONLINE**  
[www.ccfcme.org/1CISummit12](http://www.ccfcme.org/1CISummit12)

Once you register online, please do not mail in a registration form. Cleveland Clinic employee fees and registration are available online only.

## COMPLETE THE INFORMATION BELOW IF REGISTERING BY MAIL

### FEES

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<tr>
<th></th>
<th>On or Before October 3, 2012</th>
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<tbody>
<tr>
<td>Fee</td>
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<td>$425</td>
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- Physician  
- Resident/Fellow  
- Nurse  
- Allied Health Professional  
- Other

### BREAKOUT SESSION SIGN UP

Please select your choice from each session:

**Session I:**
- A. Business Review – Strengthening Clinical and Operations Accountability for Better Patient Care  
- B. Cleveland Clinic Approach To Managing CI Project Portfolio  
- C. Implementation and Evolution of an Enterprise-wide Service Line Performance Management Initiative  
- D. Henry Ford Health System: Customer Focus and the Malcolm Baldrige National Award  
- E. Akron Children's Hospital: Designing Lean Processes to Increase Patient Access

**Session II:**
- F. Productivity Reporting to Manage Labor Costs and Improve Organizational Performance  
- G. Lean at Denver Health: Saving Lives, Saving Money, Saving Jobs  
- H. Parkview Hospital: Physician Engagement in the Continuous Improvement Process  
- I. Improving Access by Improving Utilization  
- J. Organizational Structure – Neurological Institute Embed Model

**Session III:**
- L. Quality and Patient Safety  
- M. Continuous Improvement in Supply Chain Management  
- N. Patient Experience at the Cleveland Clinic  
- O. Using the Healthcare Value Network's Shingo Prize Model to Assess and Accelerate Continuous Improvement at Christie Clinic

### OPTIONAL GEMBA TOUR

Tuesday, November 13, 2012  
Fee: $175

- I will attend the Optional Gemba Tour  
  (space is limited)

Please choose one site per Tour Group:

**Group A – 8:00 am – 9:00 am**
- Heart and Vascular Institute  
- Emergency Department - Split Flow Implementation  
- Supply Chain Service Center  
- Cleveland Clinic Laboratories  
- Inpatient Responsiveness Improvement Process  
- The Cleveland Clinic Experience

**Group B – 9:30 am – 10:30 am**
- Heart and Vascular Institute  
- Emergency Department - Split Flow Implementation  
- Supply Chain Service Center  
- Cleveland Clinic Laboratories  
- Inpatient Responsiveness Improvement Process  
- The Cleveland Clinic Experience

**Group C – 11:00 am – 12:00 pm**
- Heart and Vascular Institute  
- Emergency Department - Split Flow Implementation  
- Supply Chain Service Center  
- Cleveland Clinic Laboratories  
- Inpatient Responsiveness Improvement Process  
- The Cleveland Clinic Experience

### TOTAL AMOUNT ENCLOSED

- Conference $___________  
- Optional Gemba Tour $___________  
- Total Amount $___________

- I require a vegetarian meal

**PLEASE PRINT**

- First Name:  
- MI:  
- Last Name:  
- Degree:

- Company Name:  

- Address:  
- City:  
- State:  
- Zip:  
- Phone Number:  
- Fax Number:  
- Specialty:  
- Email Address:  

**Make check payable:** The Cleveland Clinic Educational Foundation

Purchase orders are not accepted.
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