

 KAISER PERMANENTE®

TC3

TRANSFORMING CARDIOVASCULAR
CARE IN OUR COMMUNITIES



CCI
CENTER FOR CARE
INNOVATIONS



TC3 Site Visit Planning Call

Transforming Cardiovascular Care in Our Communities

July 9, 2019 | 3-4pm

Who is on the call?



- Name & Organization
- What site are you planning to visit, and how did you choose this site?
- What processes are you planning to shadow during the site visit?
- What would success look like for your site visit?

Denise Armstorff

Master Coach

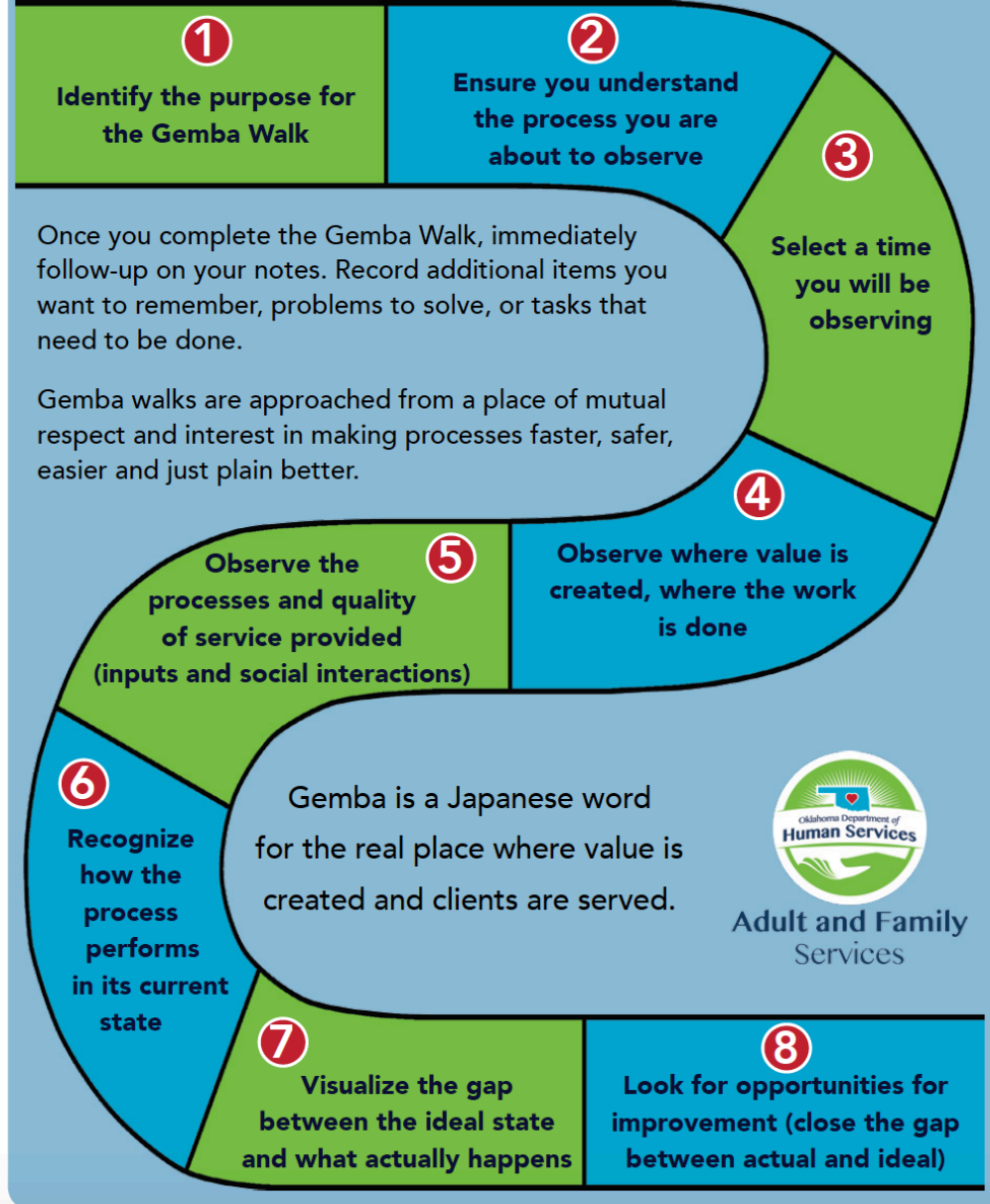


TC3 Grantee "Go and See" Site Visits

“Go and See” Site Visits

- “Go and See” where work is done
- Tell the people at the site what to expect (e.g. that they should show processes instead of tell, etc.)
- Ask open ended questions, listen
- Show respect: Approach from a place of mutual interest in making processes better for staff and patients
- Debrief & record in your notes:
 - Anything you want to remember
 - Problems to solve
 - Tasks that need to be completed

8 Steps in Gemba Walk



Site Visits like these are generally successful when you...



Site Visit Schedule

Time	Activity
8:00 – 8:30 AM (30 minutes)	Gather to organize and review data collection materials and receive observation assignments
8:30 AM – 12:00 PM (3.5 hours)	Observe assigned process/activities
12:00 PM – 1:00 PM (1 hour)	Lunch
1:00 PM – 2:30 PM (1.5 hours)	Additional observation time (if needed)
2:30 PM – 4:00 PM (1.5 hours)	Gather to debrief learnings and discuss next steps

Host organization will provide:

- Location for gathering/meeting spot
- Names of individuals from hosting organization/site who should be invited
- Data collection sheets to record observations
- Conference room and name of individual who can assist with lunch coordination (CCI will provide lunch) and assist if observers need assistance during the day

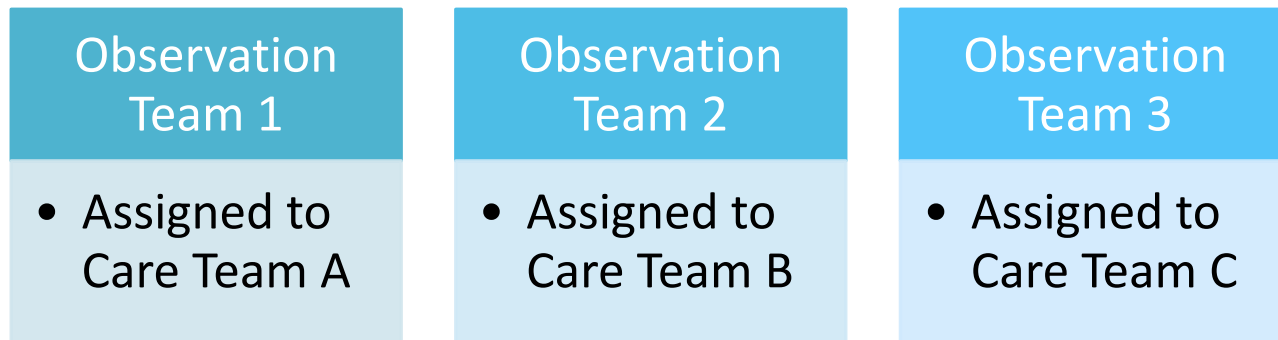
Suggested Site Visit Model

Divide observers into teams of 2 – 3 people

- Team members can also be assigned specific areas/activities to observe (see data collection tool)

Identify 3 Primary Care/Family Practice units/care teams to observe

Assign each team to observe one unit/care team and split up to observe



Possible Site Visit Models

Observation
Team 1

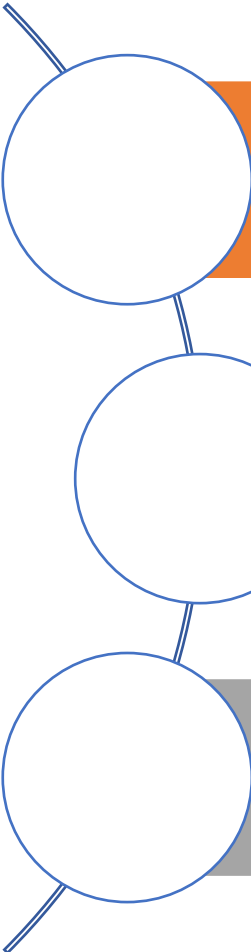
Denise
Patient Care
Experience

Alexis
Blood Pressure
Measurement

Michael
Use of Data/
Information
Systems

TC3 Site Visit Observation Notes Document

Group Discussion



How might you customize the sample agenda and standardized tool for your visits?

How are you communicating with and preparing the site you are visiting for a successful visit?

What questions or concerns do you have about the site visits?

Thank you!