

The Dartmouth Clinical Microsystem Playbook Guide

This guide is designed to support the creation of your Playbook using your best known practices and SDSA (Standardize-Do-Study-Act) results.

What is a Playbook?

A playbook is a collection of core and supporting processes used routinely by your microsystem that have been tested using improvement science and have resulted in “the way we want this process done.” The playbook serves as the repository for standard processes (SDSA).

What is the purpose of a Playbook?

The purpose is to provide a common, known place to collect standardized processes of care (SDSA), and step-by-step actions taken in your unit.

The processes within the playbook are used to increase safety and reliability and to decrease variation and waste in the way processes are executed. The SDSA processes also serve to ensure improvement does not “slip” and that new processes and habits are maintained and improved upon.

Liker (2004) reminds us of Henry Ford’s perspective on standardization, “Today’s standardization is the necessary foundation on which tomorrow’s improvement will be based. If you think of “standardization” as the best you know today, but which is to be improved tomorrow- you get somewhere. But if you think of standards as confining, then progress stops.”

What are the steps to creating a Playbook?

Once you have completed testing best process designs for your microsystem, you can create the FINAL (SDSA) version of how the particular process should be completed all the time. Ideally, the process should be depicted in a flowchart, or deployment flowchart, showing step-by-step actions taken by a designated staff member.

Additional “tools” that support the process can be included such as:

- Data collection forms
- Blank forms such as huddle sheets and report forms, and
- Pictures of how to complete processes

There are 3 basic steps to making your Playbook:

1. **Table of Contents:** Create a table of contents listing the individual processes in your microsystem. A notebook is a convenient way to store the materials and to make it easy to copy and update the flowcharts. Some have found using clear “sleeves” (to store the flowcharts and forms in), protects the pages and also allows additional copies to be readily available. With increasing electronic resources you may decide to post your Playbook on your intranet to increase accessibility.
2. **Templates:** Complete the playbook checklist for each process to outline what is included in the section specific to a process. You will see other details to complete on the checklist to ensure the processes are the most current and updated.

Flowcharts: Following the checklist, insert your process flowchart(s), additional forms, pictures and information. Repeat this for each process you have listed in your table of contents. Include digital pictures of how equipment is set up or what equipment or medications or supplies look like.

3.

How do you maintain your playbook?

Your playbook will evolve over time as you test processes and identify new standardized processes. It is very important to “refresh” your playbook at pre-determined intervals and when improvement cycles are done.

Use the checklist template to identify who will be responsible and when the process will be kept current. In general, people who are part of the process should be the ones responsible for keeping the playbook current.

The best method to ensure that the recommended steps in a process are being completed is to identify someone to observe the current process, step-by-step and make notes when the steps are not performed as documented.

This may occur for several reasons:

- The individuals were not aware of the playbook
- The process has changed and not been reflected in the playbook
- Individuals have decided to complete the process using their own style
- Equipment/materials/supplies have changed
- Physical space has changed

All of the above reasons remind us why playbooks, education and reminders are important. Staying close to the process helps identify when the playbook needs to change and when new flowcharts need to be completed. This whole process reminds us to use improvement science to test new ideas and not just “plug” them in as individuals see fit.

How is the playbook used?

The playbook can be used in several ways:

- Interview of a potential new staff member
 - Review of the playbook offers a clear communication about how the microsystem functions and how it expects members of the microsystem to interact with each other. One microsystem decided NOT to hire a job candidate, because the potential employee did not agree with standardizing the processes.
- Orientation of a new staff member
 - The playbook becomes an efficient way to orient staff to core and supporting processes. Because the playbook is mostly in a flowchart format, the steps in the process are easy to identify and to reproduce. Flowcharts provide an easy way for new staff to learn and remember the steps.
- Performance evaluation
 - The playbook can be used during performance evaluation times to review expected performance vis a vis and actual performance. The playbook is useful throughout the year to review and ensure that standardized processes are being carried out by all members of the microsystem.
- Orientation for temporary staff
 - Periodically, temporary staff—such as per diems, floats or travelers—may become part of your microsystem. The playbook is a helpful resource and reminder for your temporary staff to help them do their part of the work in the desired way.

PDSA↔SDSA

When deeper knowledge is realized after a period of time of standardization, it will be important to explore how to improve the process to a higher level of best practice (PDSA) and ensure the changes and improvements are reflected in your updated version of the process in the Playbook. Remember that process improvement is continuous and moves between PDSA and SDSA.

Reminder

Remember to include measures to be tracked to ensure the process is standardized. Draft displays of the data collection or data collection sheets should be included.

Attachments:

You will find the following to help you create your Playbook:

- BLANK Playbook Checklist
- Annotated version of the Playbook Checklist
- Example of the beginning of a Playbook from Children's Hospital of the King's Daughter

PLAYBOOK CHECKLIST

Name of Process: _____

Contact Person: _____

Which of the following are included in this section?

Flowcharts/Deployment Charts

- _____
- _____
- _____
- _____

Forms

- _____
- _____
- _____

Data Collection Sheets: Include measures that will be monitored to ensure standardized process specifications are being followed.

- _____
- _____
- _____
- _____

Pictures

- _____
- _____
- _____

WHO will observe, review and update?

_____ (Name)

_____ (Date(s) of review)

DATE of last review:

_____ (Date)

DATE to report findings of review to lead improvement team: _____

Include **brief description** as needed

PLAYBOOK CHECKLIST

Purpose: The Playbook is a catalogue of “best practice” and a process to review, monitor and update processes over time.

The Playbook:

- is a standard format to catalogue processes that have been improved and are in the SDSA (Standardize-Do-Study-Act) state
- contributes to orientation of new staff
- increases accountability of those involved in the process for performance evaluations
- should be reviewed periodically throughout the year to ensure standard processes are being practiced
- should be reviewed to move to PDSA(Plan-Do-Study-Act) when new practice or technology triggers improvement and changes in the process

Name of Process: _____

Contact Person: _____

Which of the following are included in this section?

Who is the **lead person to contact** for further information, updates and tips for this process? Include their contact information

Flowcharts/Deployment Charts

- _____
- _____
- _____
- _____

Be sure to include WHO does WHAT WHEN.

Forms

- _____
- _____
- _____

Include any brochures, pamphlets, documentation, report or other forms that support this process.

- Data Collection Sheets:** Include measures that will be monitored to ensure standardized process specifications are being followed.

- _____
- _____
- _____
- _____

These sheets should include the measures with operational definitions to ensure anyone could monitor the process to see if it is operationally performing as intended. Look for variation as an indication of standardization not happening and then research why.

- Pictures**

- _____
- _____
- _____

Pictures say a million words. Pictures of how equipment should be organized or what dressings should look like help everyone see how to perform processes.

WHO will observe, review and update?

Set a plan in advance with a timeline of WHO will observe, review and update this process using the data and monitoring sheets above

(Date(s) of review)

DATE of last review:

Update this when reviews are conducted to document when the last review occurred and alert members when dates have expired.

DATE to report findings of review to lead improvement team.

1. Plan to create your own HARD COPY Playbook for easy reference
2. You may wish to post electronically on your organization intranet or shared drive

Proactively plan time in your meeting agendas to have report outs of Playbook findings