

Idea Progress Board

Goal

This tool helps you collect feedback from staff and show staff how you're using their ideas.

Manager Time Commitment

To implement: 30 minutes

To maintain: 5 to 10 minutes for discussion at change-of-shift or unit huddle

Staff Time Commitment

5 to 10 minutes for discussion at change-of-shift or unit huddle

How to Use This Tool

1. Create an Idea Board.

- a. **Hand-draw** a 2x2 grid on a whiteboard in your daily huddle area. Use the template on page 69 as a guide. Make sure you draw the grid big enough for one envelope to easily fit in each quadrant.
- b. **Tape** one envelope into each quadrant of the whiteboard. Each envelope should be big enough to store 8.5"x11" pieces of paper. (Make sure the envelopes don't cover the words in each quadrant, or write the corresponding quadrant label on each envelope.)
- c. **Tape** an envelope big enough to store 8.5"x11" pieces of paper on or below your whiteboard. Label it: New Ideas.
- d. **[Optional] Write** your team's top three priorities at the bottom of the whiteboard. You'll later use these as prompts for staff ideas. If you have trouble deciding on only three priorities, pick the ones where you particularly want staff buy-in or new ideas.

2. Prepare to lead a training session on the Idea Board.

- a. **Print** the New Idea Form on page 70 and Idea Triage Cheat Sheet on page 71. You'll need one copy of each per staff member, plus two extra.
- b. **Fill out** the New Idea Form for two sample ideas. You'll want to create an "Implement" and a "Do Not Pursue" example.

3. Introduce the Idea Board to your staff in a quick training session.

- a. **Use** the Facilitator Guide for an Initial Training Session on page 72-74.

4. Once a week, take five minutes to prioritize new ideas with staff at change of shift.

These steps are a high-level overview of how to triage ideas in the moment. For more information on triaging ideas, review the Idea Triage Cheat Sheet on page 71.

- a. **Review** any New Idea Forms from the New Ideas envelope as a group. You'll want to ensure staff understand the new idea so they can easily triage it.
- b. **Decide** if the idea supports your team's top three priorities. If an idea does not align with your team's priorities, explain that this idea can still move forward but other ideas may take priority.
- c. **Decide** each new idea's impact and complexity. Use the Idea Triage Cheat Sheet as a guide. Then place the new idea in the appropriate Idea Board quadrant.
- d. **Decide** if you want to begin immediately working on an idea that is sorted into the "Implement" quadrant. Base this decision on how many projects are already underway and how much time your staff has.
- e. **Ask** for volunteers to "own" each new idea that the group decides they want to immediately work on.

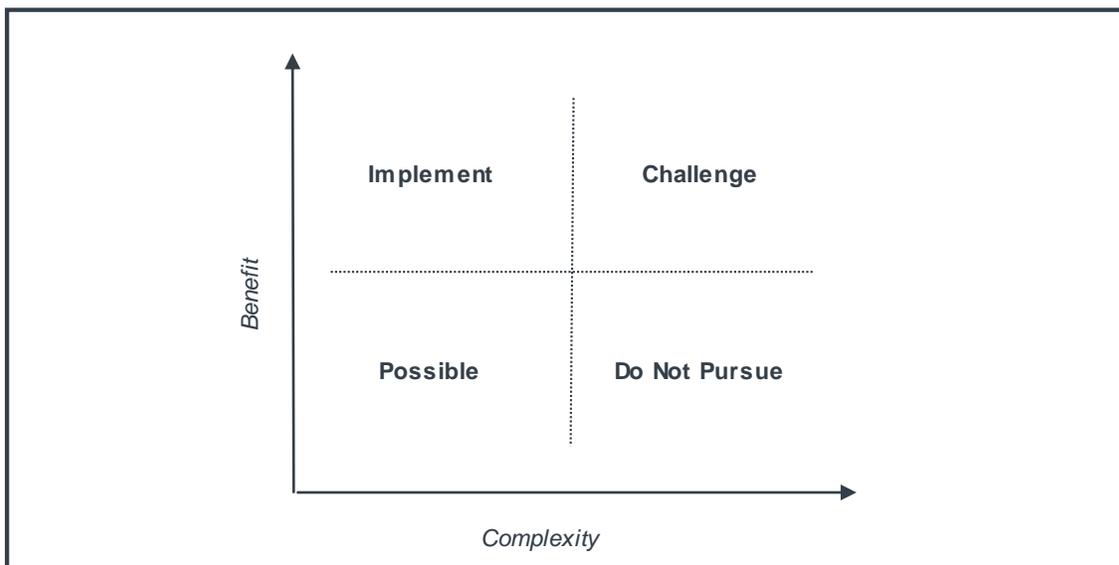
5. At each change of shift, take five minutes to discuss current projects.

- a. **Review** all ideas that are currently underway.
- b. **Acknowledge** any completed ideas and remove them from the board. Keep a record of these completed ideas.

How to Draw an Idea Board

Use this template to draw your own Idea Board. Make sure you draw the grid big enough for two 8.5"x11" pieces of paper to easily fit in each quadrant.

Idea Board



Optional Additions to Your Idea Board

Team Priorities	Things We're Working On
1 _____	1 _____
2 _____	2 _____
3 _____	3 _____
4 _____	4 _____



New Idea Form

Name _____ Date _____

Describe the problem.

Why is it happening?

How can we fix it?



Idea Triage Cheat Sheet

This cheat sheet will help you triage new ideas in two easy steps.

1. Answer these questions to decide if the idea is complex and if it will benefit your team.

How complex is this idea to do?

- Yes No Will it require a lot of time?
- Yes No Will it require a lot of resources?
- Yes No Will it require a lot of stakeholders?
- Yes No Will it require organizational approval?

How many times did you answer "yes"?

0-1 times Low complexity
2-3 times Medium complexity
4 times High complexity

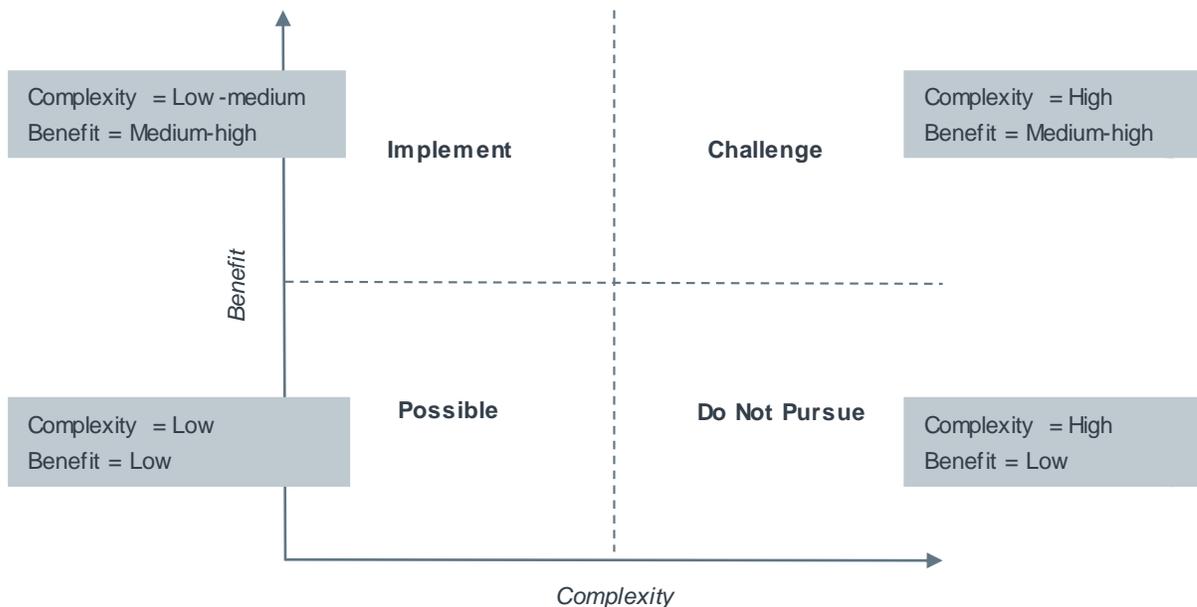
How will this idea benefit your unit?

- Yes No Does it align with team priorities?
- Yes No Will it save time?
- Yes No Will it improve quality or safety?
- Yes No Will it engage staff?
- Yes No Will it enhance patients' or customers' experience?

How many times did you answer "yes"?

0-1 times Low benefit
2-3 times Medium benefit
4+ times High benefit

2. Use your answers to the questions above to sort the idea into the appropriate category.



Source: Nursing Executive Center, *The Nurse Manager's Guide to Improving Unit Outcomes*, Washington, DC: Advisory Board, 2016.



Facilitator Guide for an Initial Training Session

This guide will help you introduce the Idea Board and triage process to your staff. Use the directions and scripting to lead a 30-minute training session with staff. We recommend one training per shift.

1. Introduction: 5 minutes

Goal: Ensure participants understand the purpose and goals of the training.

a. Tell participants why they are in a training.

- *I brought you all together today to talk about how we can continue to improve our unit's performance. Some of our best ideas come from you. But sometimes it's hard to give you feedback and actionable next steps because we're all so busy.*
- *To help, we're going to have a more structured way to collect, prioritize, and track new ideas. It's called an "Idea Board" and it will help ensure good ideas aren't lost, and that we follow through on projects. It will also help us spend our limited time on projects that we can accomplish and that will have the greatest positive impact.*

b. Share the goals for the training.

- *I have two goals for today's training. First, I'll introduce you to the idea behind an Idea Board and how it will help us quickly solve problems.*
- *Second, I'll explain how our unit will use the Idea Board during our daily huddles.*

2. Introduce the Idea Board: 10 minutes

Goal: Describe how the Idea Board and triage process works.

a. Introduce the Idea Board. (Make sure staff can see the Idea Board as you introduce it.)

- *To get started, I'm going to introduce the Idea Board and give an overview of how it will help us quickly prioritize new ideas and understand why we pursue some ideas and do not pursue others.*
- *An Idea Board is a place to prioritize your ideas about improving the unit in a way everyone can see. During our daily huddles, we'll review each new idea posted on the board as a group and assign it to one of the four categories: Implement, Challenge, Possible, or Do Not Pursue. If the new idea is assigned to "Implement," then we can move forward with the idea.*
- *I know this board looks complicated. Don't worry. I'm going to help you understand how it works by walking through the process step by step.*

b. Explain the New Idea Form.

- Distribute the handout called "New Idea Form."
- *Let's get started. To use this board, we need your ideas about improving performance. For example, you may have an idea that will help improve [state one of your team's priorities]. To submit this idea, fill out the New Idea Form by describing the problem you observed, what is causing the problem, and your proposed solution. Then, put the form in the envelope labeled "New Ideas."*
- *You can sign your name on the form, but you don't have to. I want you all to feel comfortable submitting your ideas.*
- *We'll store additional copies of the form [location where you'll store copies.]*



c. Describe the Idea Board.

- *Before we jump in to how to triage ideas, let's take a minute to better understand the four categories on the board.*
- *There are two considerations that help us decide which category to sort a new idea into: complexity and benefit. "Complexity" refers to how hard or easy a new idea will be to accomplish. For example, if a new idea requires organizational support and a lot of time and resources, it may be more complex than some other ideas. The other axis, "Benefit," means how much a new idea helps the unit. For example, if an idea supports our team priorities and enhances the patient experience, then it will have a high benefit to our team.*
- *Each time we review a new idea, we'll decide the complexity and benefit of the idea and then place it in the corresponding category.*
 - *If an idea is low-to-medium complexity and medium-high benefit, then it will go in the "Implement" category on the top left.*
 - *If an idea is low complexity and low benefit, then it will go in the "Possible" category on the bottom left.*
 - *If an idea is high complexity and medium-to-high benefit, then it will go in the "Challenge" category on the top right.*
 - *If an idea is high complexity and low benefit, then it will go in the "Do Not Pursue" category on the bottom right.*

d. Describe the Idea Triage Process.

- *Distribute the handout called "Idea Triage Cheat Sheet."*
- *As I mentioned, we'll review new ideas during our daily huddle and decide what category they belong in. This cheat sheet will help guide our idea review with two steps.*
- *First, we'll decide if a new idea is complex and if it will benefit our unit. On your handout, there are some questions to help us decide.*
- *Second, we'll select the best category based on the complexity and benefit. Again, the handout contains some guidance to help us do this. But, remember that this is a group discussion, so we'll use this cheat sheet as a guide but base our decision on the group discussion.*
- *If we put an idea in the "Do Not Pursue" category, we'll remove it from the board. If we put in the "Implement" category, we'll decide if we want to begin immediately working on it or not. We'll base this decision on the number of projects that are already underway and how much time we have. Remember, all ideas are valuable even if we don't prioritize them this time.*

e. Discuss the Tracking Process.

- *If we decide to pursue an "Implement" idea, I'll ask for a volunteer to "own" the idea. This person will oversee the project and update us on its progress during daily huddles.*



3. Closing and Next Steps: 5 minutes or less

a. Ask if anyone has initial feedback or questions. Then thank the group for their participation and discuss next steps.

- *Thank you for your participation today. As a reminder, you can find the Idea Forms in [location where you'll store copies]. I encourage you to fill out a form when you have an idea, particularly if your idea addressed our unit priorities [remind staff of your unit's top three priorities].*
- *If you have any questions or feedback, please let me know. Starting [date], we will use the Idea Board during daily huddles to help us better prioritize ideas. I look forward to hearing your great ideas!*