

BUILDING A LEGACY, SHAPING THE FUTURE

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Quality Improvement in an Academic Organization: A Lean Approach

Learning Objectives

- Describe steps in a Lean project that led to an improved teaching assistant orientation
- Identify Lean tools used to improve the teaching assistant orientation process within an academic organization

Disclosure Statement:

The presenters have no personal financial relationships with commercial interests relevant to this presentation to disclose.



Background of Lean

Manufacturing Systems

Health Care Settings

Academia



What is Lean?

- 1. Specify value from the customer's perspective
- Identify and eliminate waste
- Create flow without interruptions
- 4. Pull value into the process
- 5. Pursue perfection





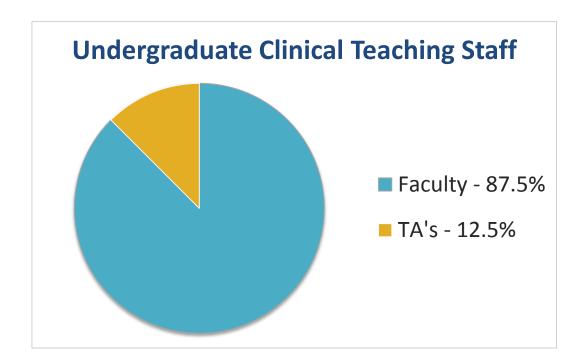
Using a Lean Approach in Academia

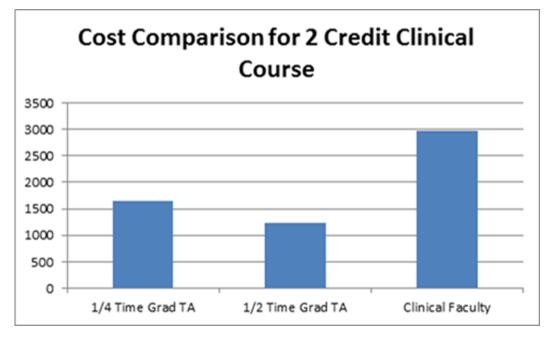
- ✓ Higher education has customers
- ✓ Education's mission is to add value to the end customer
- ✓ Customers have "wants" and expect certain outcomes
- ✓ Processes across the university could be analyzed from a value perspective



Teaching Assistants

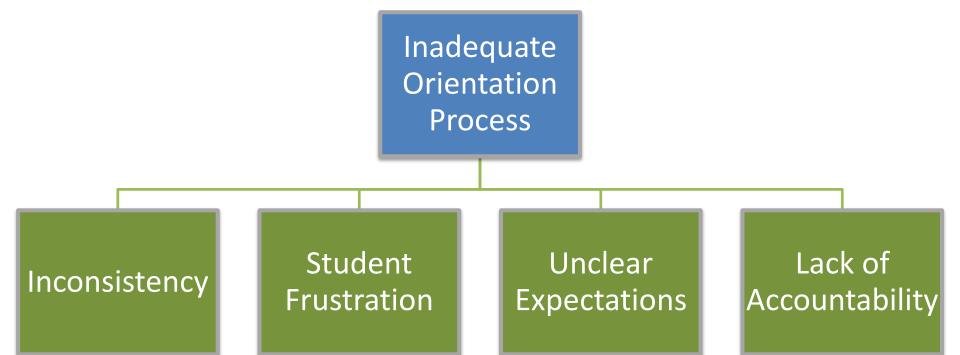






Defining the Problem

The policy/process for Teaching Assistant (TA)
Orientation was not clearly delineated.



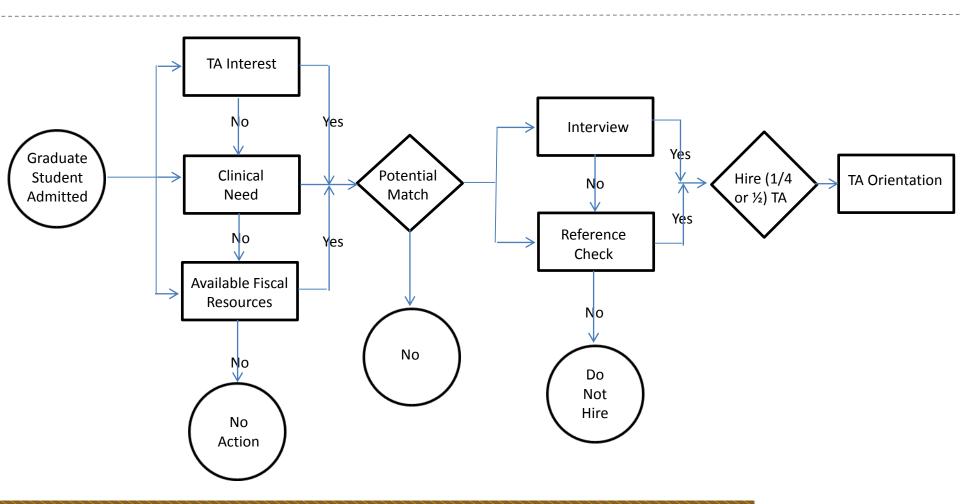


Project Goals

- The purpose of this project was to redesign the process of TA orientation in the school of nursing using Lean principles to improve **flow** and reduce **waste**.
- This project focused on the time period from when the TA had been accepted as a graduate student through being matched with and starting as a teaching assistant in a course.

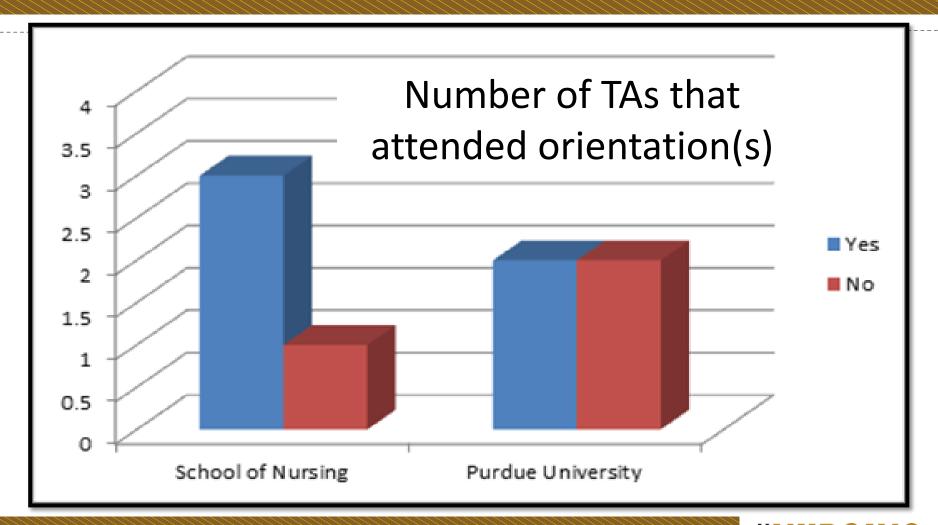


Measuring the Current State





Voice of the Customer Survey





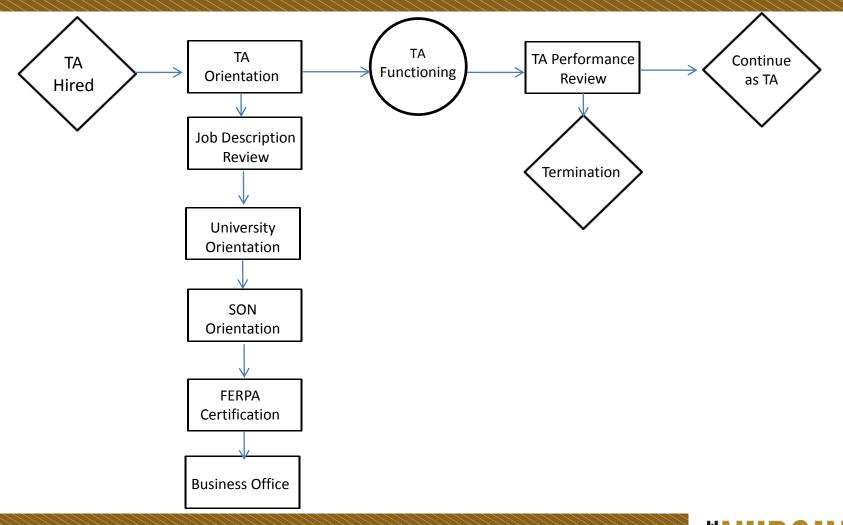
Root Cause Analysis

5 Why's: There is an inconsistent completion of orientation by the TAs entering the School of Nursing (SON).

- 1. The TAs have competing priorities upon entrance to SON.
- They are overextended between family, work, school, and TA responsibilities.
- 3. The TA position is then added to all of their current responsibilities.
- 4. Unrealistic expectations of self
- 5. SON expectations are unclear



Improving the Process





Solutions to Root Cause

- Attending mandatory orientation
- Completing FERPA training
- Meeting with designated key faculty
- Reading the TA handbook
- Reading the revised TA job description
- Signing a responsibility contract

The orientation packet is stored in an electronic folder that can be easily accessed by TAs.



Timeline

Tasks	9/15/2013	9/22/2013	9/30/2013	10/7/2013	10/14/20132	10/21/2013	10/28/2013	11/4/2013	11/11/2013	11/18/2013	11/25/2013	12/2/2013	12/9/2013	12/16/2013	1/6/2014	1/20/2014					
Initial Meeting		Tea																			
Develop Problem Statement		Tea	m																		
Develop stakeholder survey			Kare	en												[KEY				
Determine current TA Orientation	current TA Orientation Process				Vick	(i												Compl			
Administer Survey					Vicki		i								In progr						
PFM					Pam		1											Late	2		
Complete root cause analysis					Team		m														
Develop goal for project					Team		m														
Identify potential solutions								Tea	m	n											
Obtain current TA orientation materials									Becky, Pam & Kristen												
Develop TA orientation process												Tear	m								
Create a checklist/handbook for TA orientation									Becky/Pam												
Complete Improve section												Team									
Determine placement for Orientation Materials												Tear	m								
Put all documents together for orientation										Becky & Pam											
Implement new process for orie	ntat	ion															Process Owi				
Measure post implementation																	Pro	ıer			



Measurable Outcomes

- 100% of tools for TA orientation were created and uploaded into the SON shared drive
- New TAs that were hired this fall were given orientation packets by the Director of Undergraduate Programs
- 100% of TAs attended mandatory orientation Fall 2014



Sustaining & Monitoring Changes

- Routine business practice of hiring and processing a TA in the SON
- Process owner identified as the Undergraduate Program director
- Project team will continue to meet quarterly for one year to ensure the policy change has been effective



Project Title and Area: TA orientation for the SON

Date

Clinical Faculty

Course

1/2 Time Grad TA

Problem Statement: The policy/process for TA orientation is not clearly delineated. This project will focus on the time from when the TA is accepted as a graduate student through being matched and starting within a course.

Cost Comparison for 2 Credit Clinical

5000

2500

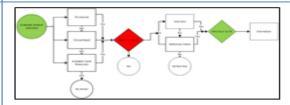
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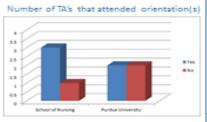
1900

1/4 Time Grad TA

Beckground

- Inadequate TA orientation/policy can lead to:
- May result in inconsistent student outcomes
- •Undergraduate & graduate student frustration
- Deficiency in knowledge for TA expectations
- -Lack of consistency in TA accountability & sanctions
- TA's make up 12.5% of the clinical teaching staff
- Using a base salary of \$70,000 the cost comparison:
 The cost of 1 clinical track faculty covering 2 clinical groups = \$3939/mo.
- •The cost of using 2 quarter time TA's (each TA covers one group)s = \$3312/mo.
- •The cost of one % time TA (to cover 2 clinical groups) is \$2475/month.
- ---Supporting Statement: When comparing the cost of full time faculty with TA salaries, the use of TA's is a cost effective alternative for clinical support staff especially when considering the future potential of nursing faculty shortage.





90-100% of tools for

be developed.

uploaded and

semester.

the Spring 2014

the TA orientation will

available beginning in

Goal:

Discussion of process revealed that entrance of a TA into the SON was seamless until the orientation aspect is introduced. At this point there is a significant variation in what each TA completes.

Primary Obstacle:

Inconsistent completion of orientation by the TA's entering the SON.

Root Cause Analysis

5 Why's:

- The TA's have competing priorities upon entrance to SON.
- 2. They are overextended between family, work, school, and TA responsibilities.
- 3. The TA position is then added to all of their current responsibilities.
- 4. Unrealistic expectations of self
- 5. SON expectations are unclear

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16	Measure postimplementation		ı						ı									Process Owner						

Table 1

Solutions to Root Cause: Document and Tools

Development

- ---TA Handbook
- —TA Checklist and Acceptance of Responsibility Contract
- -Improved TA Job Description
- ---Secured portal for storage and access for all new TA orientation information

Outcomes:

•100% of tools for TA orientation are created and uploaded in to the SON Shared drive – titled "TA Orientation documents".

Fall 2014 - new TA's hired

- Upon acceptance of the TA position, he/she will be given the packet by the Director of Undergraduate Programs.
- •The completed checklist and Acceptance of Responsibility Contract will be returned within 2 weeks or by the first day of classes – whichever date is earlier.

Process Owner: The

Undergraduate Program
Director will assure that the
orientation packet is given to
and completed by the TA.

Follow up:

The team will continue to meet quarterly until 100% of documentation is continuously submitted for 1 year to ensure the policy change is effective.

Analyze

Control

Improve



Lessons for the Field

- Lean methods can be a leadership approach to quality improvement in the academic setting to improve processes and reduce waste
- Lean tools, such as current and target state maps, are useful in identifying how to achieve an organization's academic mission
- Lean can be incorporated into the curriculum to educate students as more faculty are trained in Lean



Discussion

Questions?



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Responsibility Contract

Directions: The TA should complete this form and provide a copy to the Undergraduate Program Director for placement in the student's file.

Please provide a √ in the box verifying completion of the following items:

Activities Completed Mandatory University Teaching Orientation (attended on campus or completed online) Mandatory TA Orientation for the SON Mandatory FERPA Certification Meeting with Course Coordinator Meeting with Faculty Mentor Meeting with Undergraduate Program Director

Materials Reviewed

- Teaching Assistant Handbook
- Teaching Assistant Job Description
- ☐ Course Syllabus

My signature below indicates I have completed all of the required activities above. Additionally, my signature indicates I have read, completed, and understand all of the materials above, and hereby agree to comply with all components of these documents.



TA Handbook

Includes:

- TA responsibilities
- Tips for success
- Chain of communication
- University and departmental resources
- TA job description
- TA evaluation tool
- Job aid on reserving classrooms

