Visual Management Board Component Kit

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# Why Have a Visual Management Board?

You and your team can benefit from a wall display that guides your daily and weekly safety work. The display helps you, your staff, and organization leaders see at-a-glance current status and trends in safety. The wall display also provides view of work for daily stand-up huddles.

# Tips for Using a Visual Management Board

1. Keep the aim of the visual management board in mind: The board helps you and your staff see key parts of safety performance at a glance.
2. The main users of the board are you and your staff.
3. Choose just a few items to start:
   1. The items you can use right now to show problems in your safety management that you can tackle (problems are gaps between what you want to happen and what is actually happening).
   2. The items you want to reinforce right now.
   3. The items that you and your team can keep up to date.
   4. The items you are ready to make visible today to all staff and patients/family members.
4. It is much better to have a few items on your board that you use and update daily than to have many items that become just wallpaper or static artwork.
5. Choose a space convenient for standup daily huddles even if you are not doing huddles yet.
6. A dedicated whiteboard makes it easy to update information daily, but you can start tests with paper on the wall.

# Plan-Do-Study-Act (PDSA) “Ramp”: Learn To Use a Visual Management Board

The use of PDSA (Table 1) can be helpful in identifying successful approaches to integrating the use of a visual management board in your organization.

**Table 1. PDSA Cycle Sequence**

|  |  |  |
| --- | --- | --- |
| **PDSA Cycle #** | **What question(s) are you trying to answer?** | **Preparation** |
| 1 | For one day: Can we draft a visual management board? | Look at the example of a visual management board (Figure 1) in this kit. Identify items that will work for your center. Find wall space to hang or write up. Plan to ask a couple of staff: “What do we need to know about the safety status of our work unit every day?” |
| 2 | For one day: Can we use the draft visual management board in a daily huddle? | Plan to refer to at least one item on the visual management board in the huddle. Default: Start using a list of patients and procedures for the day and patient “safety status.” *Remember that you should not have patient names available in any area with patient traffic, as this can be a violation of patient privacy.* |
| 3 | For one week: Can we use the visual management board in a daily huddle and update it daily? (Determine revisions) | Continue to update and use the visual management board for five consecutive business days. Explore ways to fold reference to additional measures or board elements into the huddle. |
| 4 | For one month: Can we use the visual management board in a daily huddle and update it daily? (Determine revisions) | Add the previous day’s surgical safety checklist observation to the visual board if using the surgical safety checklist observation. Integrate into daily huddle. Are there any other items you need to add to your starting set? |

# Visual Management Board Example: Elements You Can Use (Figure 1)

This image shows an example of a visual management board with numerous elements, such as a list of the patients for the day with safety flags, a table showing observations of surgical checklist use and the outcomes of observation, and measures such as number of days since last harm event.

# Connections to Other Components

Daily huddle: Daily huddle takes place at the wall display.

Checklist observation: Score of surgical safety checklist observation can be an element of the display.

Escalation: You can track escalation events so you don’t forget to close the loop.

Problem solving: You can record problems so they are not lost to followup.

Integration: Senior leaders have the opportunity to ask questions based on the display.

# Learn More

Visual Management Boards

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