KaiNexicon
2025 User Conference

Fostering Caregiver-Led Improvement: A Year of Impact with KaiNexus

UMass Memorial Health

Kimberly McGuigan-Robinson

Manager of Innovation Programs,
Center for Innovation &
Transformational Change

April 30, 2025

2:45 p.m.

www.kainexus.com/kainexicon

UMass Memorial Health

FOSTERING CAREGIVER-LED IMPROVEMENT

A Year of Impact with KaiNexus

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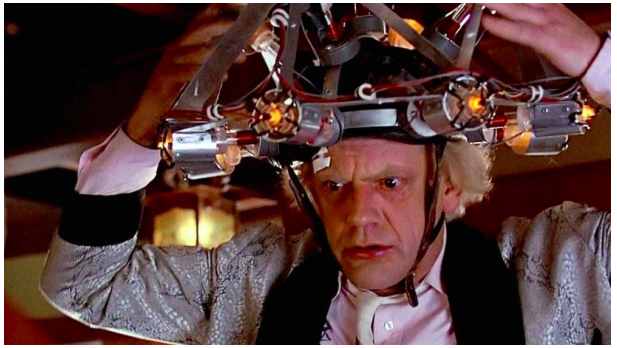
The hospitals and services of UMass Memorial Health

UMass Memorial Medical Center | UMass Memorial Medical Group
Harrington | HealthAlliance-Clinton Hospital | Marlborough Hospital | Milford Regional | Community Healthlink

WHY YOU MIGHT BE HERE



WHAT MAKES UMASS MEMORIAL DIFFERENT?

- Innovation happens at all organizational levels
- 180,000+ front-line caregiver ideas implemented
- Leaders hold regular huddles with their teams
- We listen to our workforce
- All new employees are trained on our idea system
- Ideas are welcomed, embraced and celebrated!

NATIONAL RECOGNITIONS FOR OUR UMMH INNOVATORS

BECKER'S HOSPITAL REVIEW

Great hospitals in America | 2024

AMERICA'S BEST-IN-STATE EMPLOYERS | Forbes 2024

POWERED BY STATISTA

Epic Gold Stars 10

BECKER'S HEALTH IT

Leadership · Finance · Health IT · Clinical Care · Specialties

Innovation

135,000 ideas and counting: How UMass Memorial Health drives change

Eric Dickson, MD, embraces a leadership philosophy that is focused on continuous improvement. At its core, his approach centers around a simple yet meaningful question: "What ideas do you have?"

By: **Kelly Gooch** Wednesday, December 11th, 2024

★★★★

Four-Star Quality Rated

Centers for Medicare & Medicaid Services

MHA Mental Health America

2024 Bell Seal for Workplace Mental Health Awardee

THE BELL SEAL FOR WORKPLACE MENTAL HEALTH

PLATINUM

U.S.News & WORLD REPORT

U.S. News Announces Inaugural "Best Regional Hospitals for Equitable Access" Recognition

More than 50 hospitals lauded for providing high-quality care to underserved populations.

Forbes 2024

THE BEST EMPLOYERS FOR WOMEN

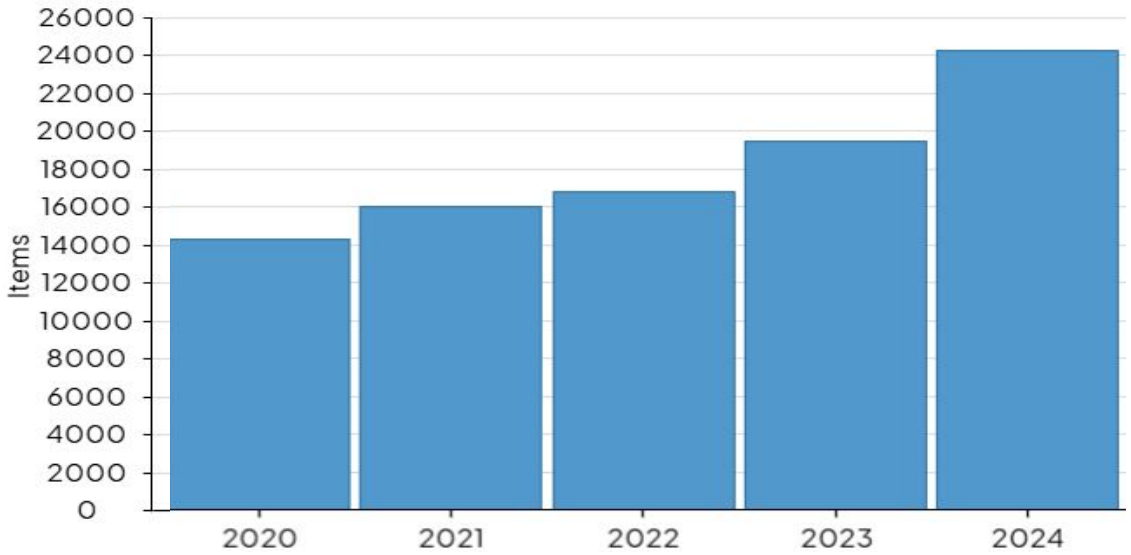
POWERED BY STATISTA

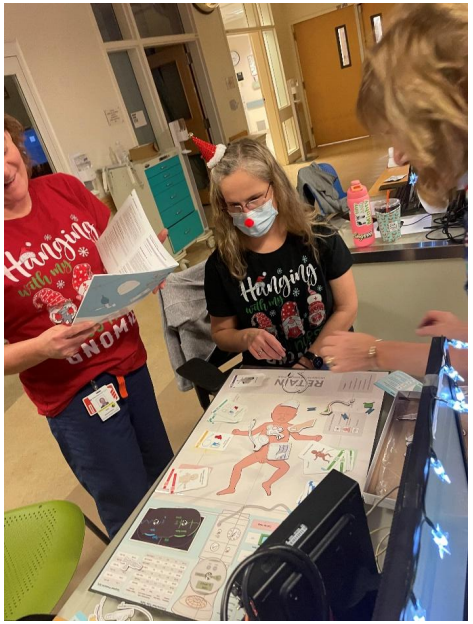
OUR HEALTH CARE SYSTEM

COMPLETED IDEAS TREND

"Every year, we implement more ideas than the year before." – Dr. Eric Dickson, CEO

~14,000 – 24,000+ ideas per year

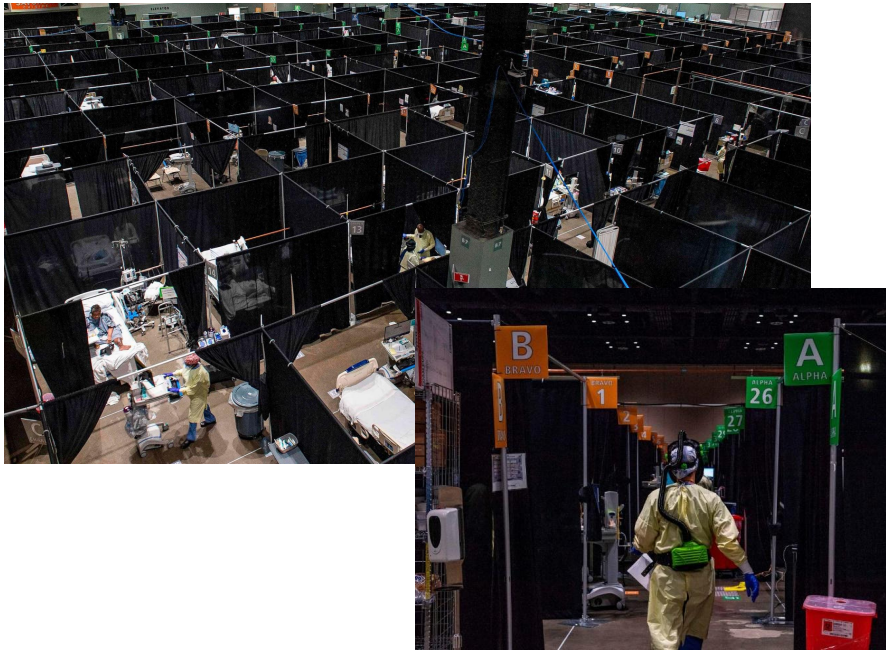




NICU Board Game for Neonatal Resuscitation

MORE THAN JUST METRICS IMPACT

Beyond metrics and financial impact, our Innovation systems have made our workforce resilient

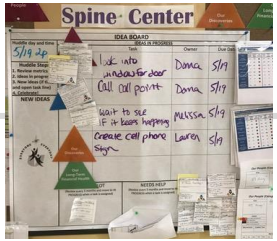


IDEA SYSTEMS TIMELINE

Explore

2014 & prior

Committing
Foundational



Emerge

2015-2019

Metrics
PDSA

Emergency

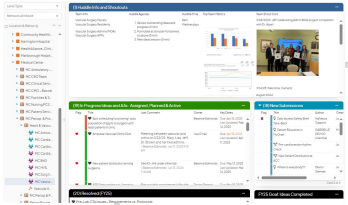
2020

Pivot
Accelerate

Evolve

2021-2022

Virtual
Systematic



Expand

2023 - 2025

Recognition
Team behaviors
Impact metrics
+50% Innovation Grants
Standard Mgr Training

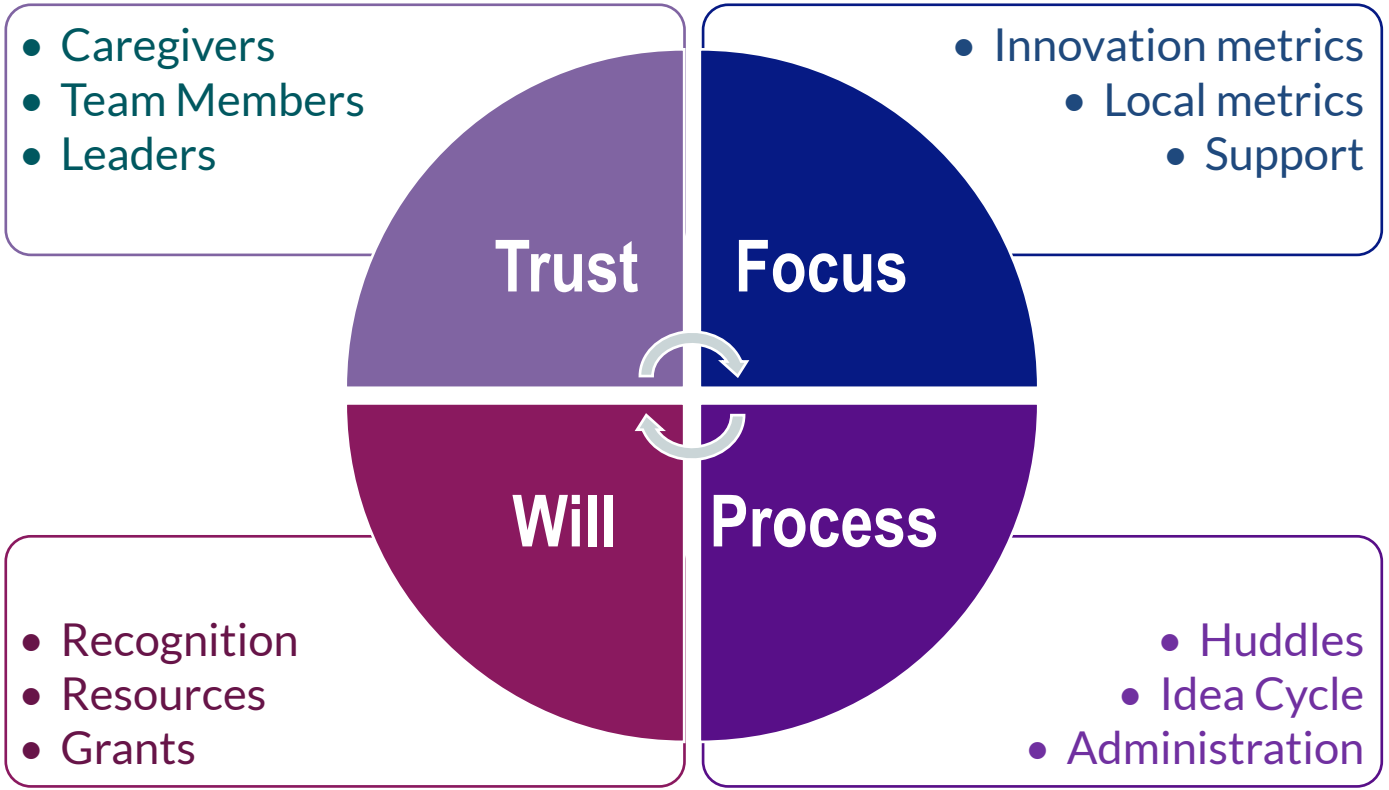
Elevate

2026+

Sustainable acceleration
Increase sharing
Require Manager Skill building
Clear collaboration processes

KEY INGREDIENTS

KEY INGREDIENTS



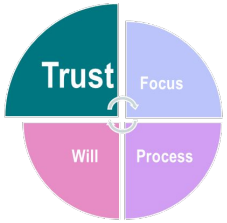
MULTI-LAYERED TRUST

Standards of Respect

TRUST IN THE INVESTMENT

"The effort up front is truly **an investment** that pays big dividends. We may 'lose' an hour of 'productivity' every week by making this protected time, but **this team gets more accomplished in the remaining 39 hours than they ever would have in 40 hours..."**

TRUST TAKEAWAYS



Get moving

- **Model cell**: Start where trust exists
- Build cross-functional teams to identify and **problem-solve around areas of mutual frustration** (start small if needed)
- Establish, measure and enforce **Standards of Respect**

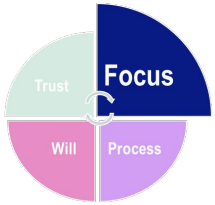
Add the groove

- Roles, goals, standard work and expectations are **defined clearly**
- Work on **trust building** in all directions
- Address trust gaps, **don't ignore** (e.g. team & leader trust training)

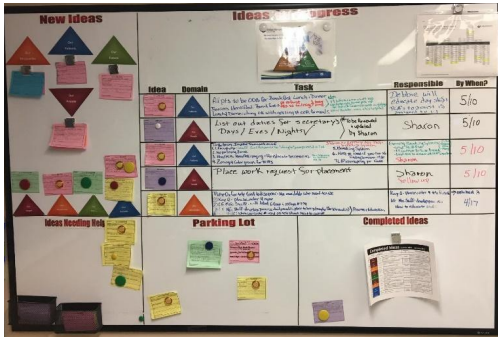
Bring the flair

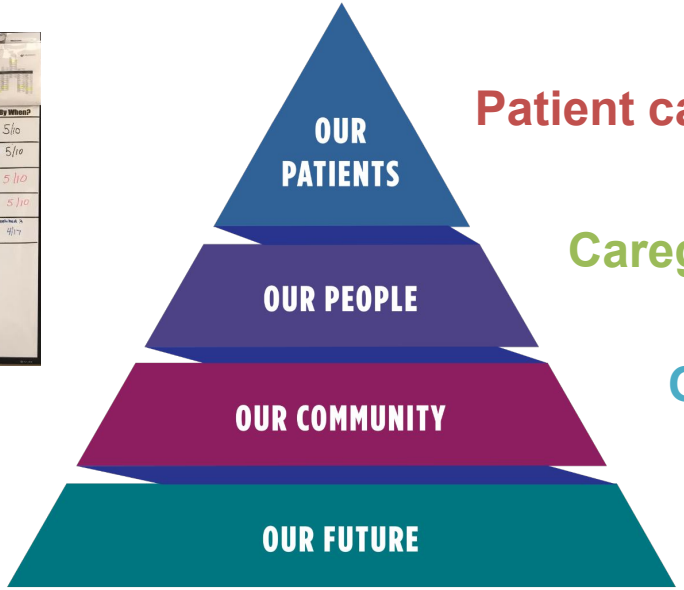
- **Empower teams** to huddle and work ideas without the leader
- Leaders naturally **recognize and support**
- **Complex problems and** change challenges are more feasible

CONSTANT CENTERING OF TRUE NORTH



2014 Idea Board





FY24 & YTD25 Impact

Patient care & experience (~34%)

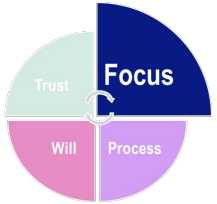
Caregiver experience & time (~54%)

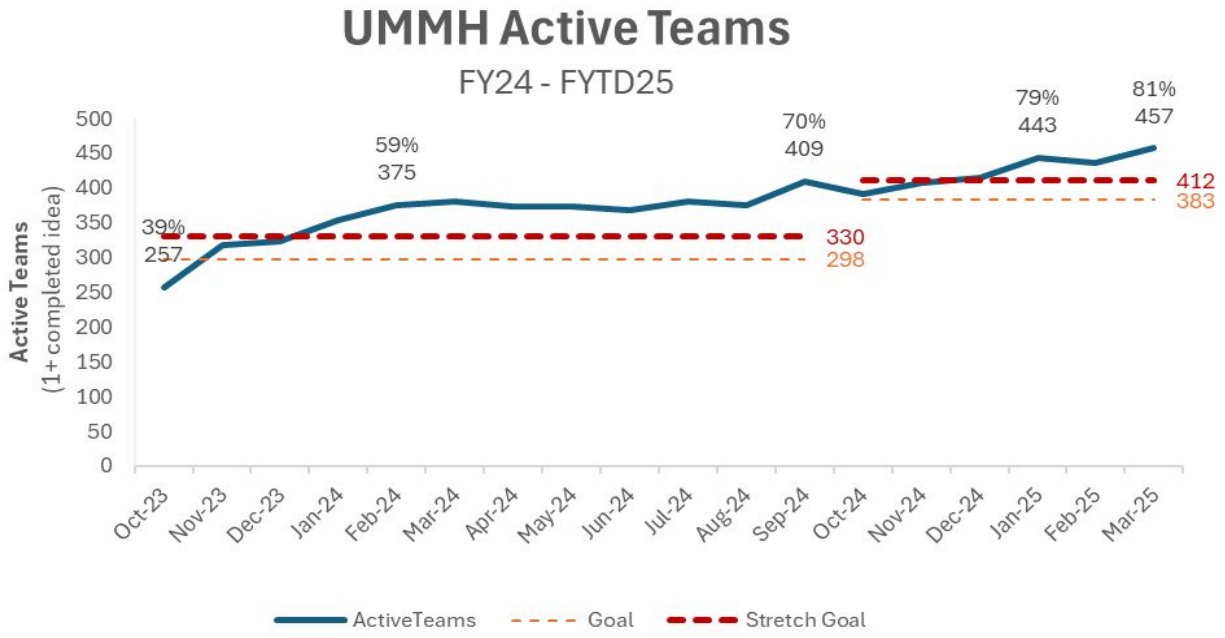
Our community (~2%)

Our future (~10%)

Percentages of ideas are based on caregiver-reported idea impact in the last 18 months (ramped up impact tracking)

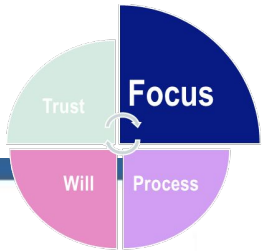
DON'T HOPE, MEASURE IT: ACTIVE TEAMS





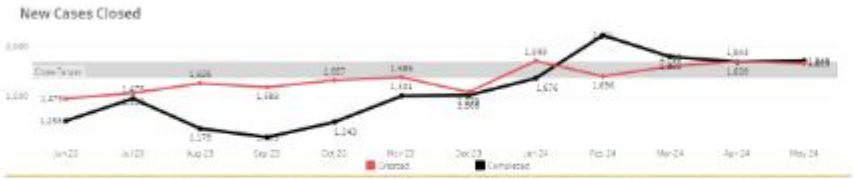
TRUE NORTH CASCADES TO DEPT METRICS TO FOCUS BOARDS

Teams add True North metrics to their huddle boards



Top Team Metrics

Dashboard for Data:



ActionableFindingsCases: Actionable Findings - Tableau Server (umassmemorial.org)

Team Shout Outs

Welcome Kayleigh!

Awesome Job BIB 16587! What an accomplishment, you should be proud!

Congratulations on our Innovators of the Year nomination. Great job

Great job team on making the presentation board.

Shout out to the Team for being involved in the new manager interviews and providing input.

IMPACT MEASURES

Initial Impact Capture

Resolution

Was this successfully implemented? ◉ Yes ○ No

Impact(s):

- ☐ Our Future: Cost Savings
- ☐ Our Future: Revenue Generation
- ☐ Our People: Caregivers Time Savings
- ☐ Our People: Caregiver Better Experiences
- ☐ Our Patients: Safety & Quality
- ☐ Our Patients & Families: Improve Experiences
- ☐ Our Community: Supporting our Diverse Communities
- ☐ Our Future: Medical Advancements & Shareable Innovation

Metric-Specific Detail Entry

Our People: Caregivers Time Savings

Time Saved:

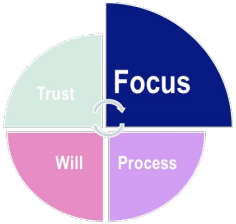
◉ One-Time ○ Recurring ○ Unknown Amount

Amount | Hour(s)

How did you base the above calculation?

Optional

FOCUS TAKEAWAYS



Get moving

- Don't let teams get overwhelmed by dept metrics – start with 1-2
- Measure & communicate innovation progress, evolve metrics
- Protect and focus dedicated support time, recruit champions

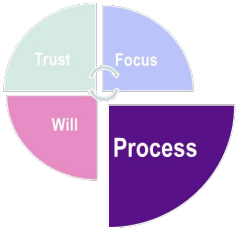
Add the groove

- Clearly align metrics / ideas to key strategies
- Evolve innovation and impact metrics, understand needs, barriers & root causes
- Expand support as the program grows

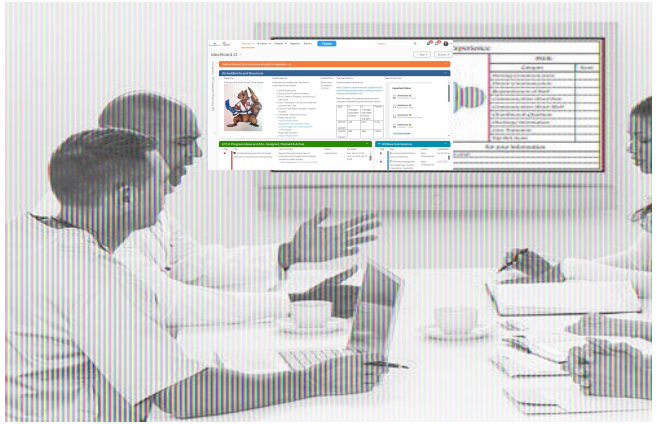
Bring the flair

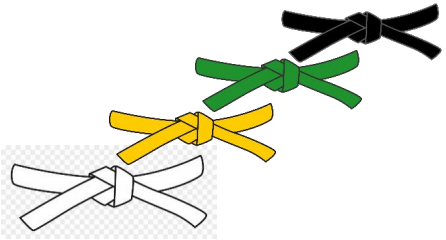
- Seamless metrics cascade to departments and individuals
- Measure, communicate and reward higher-impact achievements
- Broad, multi-mode, scalable support balancing local and central

INTEGRATED IDEA SYSTEM



MEET TEAMS WHERE THEY ARE



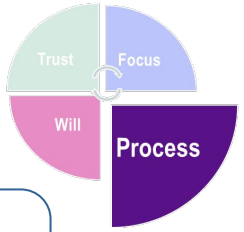


Lean Belt Training

Custom Huddle / Innovation Station Coaching & Support

Technology

PROCESS TAKEAWAYS



Get moving

- Establish a simple core process
- Let teams accomplish the objective their way
- Clarify & simplify where to go for support

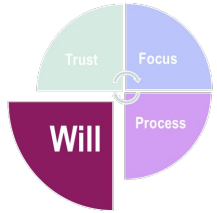
Add the groove

- Establish related standard processes & links (e.g. onboarding)
- Train teams on advanced features after they establish foundation
- Use waste & standard work as a foundation for jump-starting ideas

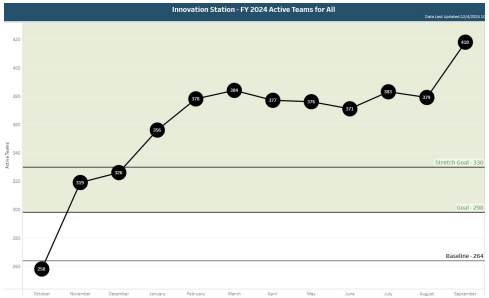
Bring the flair

- Link to related processes for larger projects, skills development
- Plan-Do-Study-Act (PDSA) is a verb: it's THE way of working
- Strong, clear processes for onboarding, collaboration and escalation

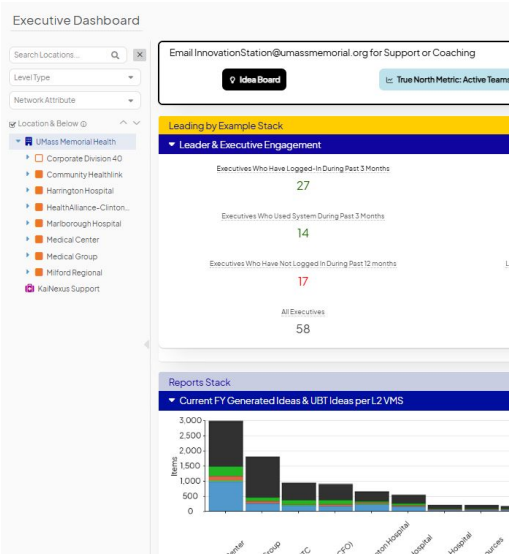
FOCUSED INNOVATION SUPPORT



Innovation/Lean Coaching, Training & Resources



Metrics Strategy, Reporting & Communications

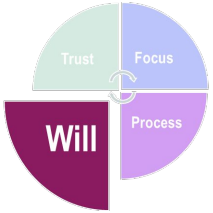


Infrastructure & Grant Administration

INNOVATORS 10 OF THE YEAR

Recognition Program Coordination

WILL TAKEAWAYS



Get moving

- Jumpstart with raffles, and non-monetary recognition (e.g. highlights)
- Focus people and teams with “no time for Innovation” on time savers
- Acknowledge successes & learnings: manage the change curve

Add the groove

- Communicate successes: recognition, skill building, reinforces will
- Leader accountability with education & coaching support
- Link grants to activity for motivation

Bring the flair

- Smooth flow of ideas to and from daily work, projects, grants, etc.
- Pull demand from people and teams who are struggling
- Build scale and consistency into motivational elements

WHERE WE'RE GOING NEXT

- Accountability
- Trust-building

- Evolve impact
- Maturity model

- Recognition
- Expand scale

- Accelerate/share ideas
- Reduce waste, expand AI

NEXT STEPS

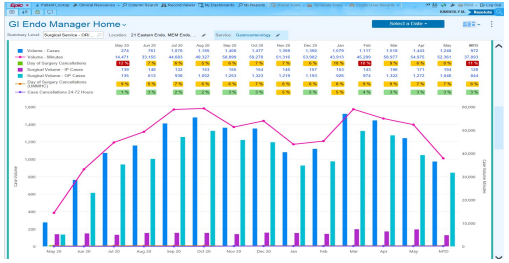
What is YOUR next test of change?

WE ARE
TRANSFORMING THE
WAY CARE IS DELIVERED
The Relentless Pursuit of Healing

UMASS MEMORIAL HEALTH IDEA SYSTEMS

APPENDIX

Center for Innovation & Transformational Change (CITC)



Strategic Project Management

- Manage cross-entity solution implementations on major strategic initiatives
- Includes major projects such as new buildings, arena Covid Field Hospital, mobile vaccines, etc.
- Project Managers & Analysts

Innovation & Process Engineering

- Train & coach advanced problem solving & improvement across UMass
- Establish and implement Innovation strategy
- Lead major transformation programs and redesigns (solutions not known)
- Master Black Belts, Black Belts, Health System Engineers, etc.

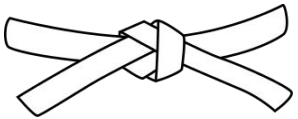
Business Intelligence & Analytics

- Data and reporting in multiple platforms such as Epic, Tableau and others
- Data warehouse design and administration
- Data Analysts, infrastructure experts, report writers, etc.

CITC caregivers collaborate & have skills across functional areas in addition to their primary expertise

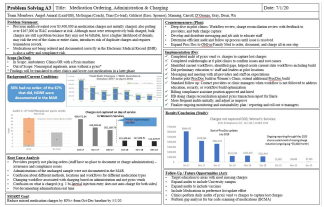
Lean Process Improvement Training

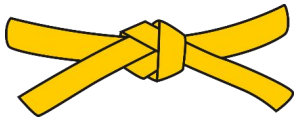
INNOVATION STATION



White Belt

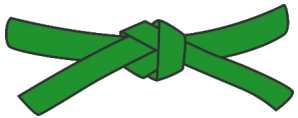
- Idea systems / innovation station
- Intro to Lean
- All Caregivers





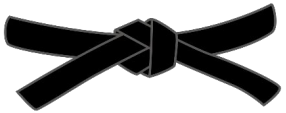
Yellow Belt

- A3 problem solving for department issues
- Metrics introduction
- Basic Lean tools
- All Caregivers



Green Belt

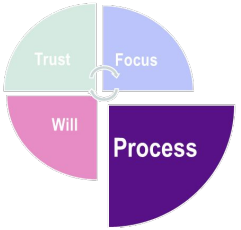
- A3 problem solving for department issues
- Intermediate Lean and analysis
- Caregivers and leaders who will draft standard work, lead improvements, help with metrics development and may be on larger project teams



Black Belt

- A3 problem solving for cross-department & cross-entity issues
- Advanced Lean & analytics
- Coaches and mentors of others
- Caregivers and leaders who lead the most complex, challenging & strategic improvement programs across UMass

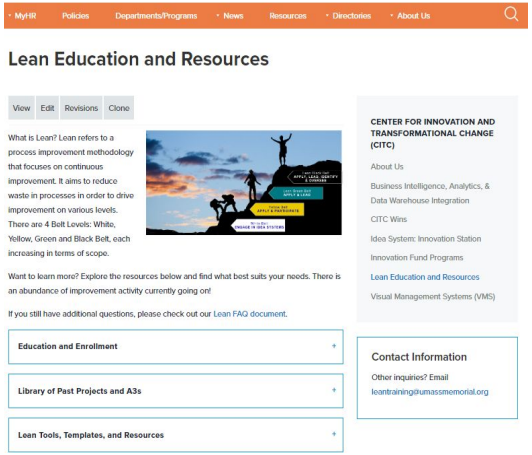
IMPROVEMENT RESOURCES



Lean Education & Resources

Improvement guidance:

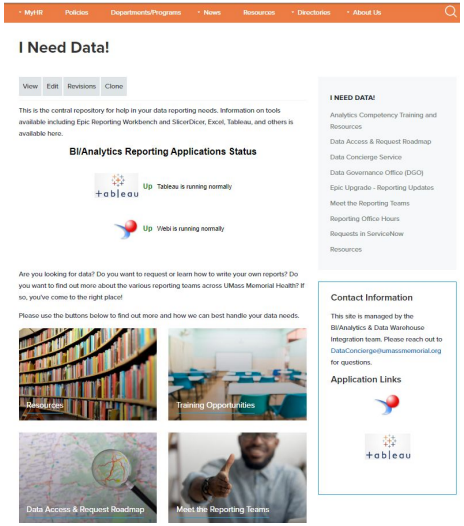
- Reference materials
- Reporting teams
- Links for Training
- For more information



I Need Data!

Reporting help:

- Reference materials
- Reporting teams
- Links for Training
- For more information



OUR BLUE-SKY FUTURE FOR INNOVATION & LEAN

Leaders living key behaviors

- Everyone is empowered: Leaders show what needs to be done, don't tell team members how to do it
- Entities are self-sustaining: "Everyone is a coach"
- More clear & fast translation of True North to Dept key metrics

100% buy-in: 100+ ideas per person!

- Everyone feels trusted & ideas are valued
- Providers all in
- Accessible to all caregivers even if not on a computer (e.g. RNs, housekeeping)
- A way of life, not an extra task…. Just something we do
- Healthy biome of prioritized ideas
- Ideas sustain over time & beyond people

Exceptional Impact

- Patient-generated ideas w/ feedback loops
- Key metrics/ideas have significant & sustainable patient / external impact
- Momentum of idea generation to completion
- Ideas have more clinical focus and enhance Joint Commission compliance
- Ideas and Lean projects are financially essential (CFOs call us regularly)

Powerful, flexible platform

- "Hey Siri, log my idea"
- Universal system to seamlessly manage Lean training
- Ideas are easily replicated / systematized
- Caregivers easily know/can find where to go for help (e.g. IS/Epic, facilities, etc.)
- We seamlessly "connect the dots"

We are known as an Innovative Organization!

- We are getting and offer continuing Innovation education
- Prospective employees know we are an employer of choice because of our Innovation Culture
- The Central MA community is aware & confident in us
- Other hospitals globally and the Lean Community looks to us as a best practice: we are a benchmark
- We continue learning about other best in class practices

INNOVATION MANAGER SUCCESS STORY

PAM CONNOR

- **Streamlined Check-in and Check-out Processes**
  Pam and the team optimized workflows, significantly reducing patient intake effort needed.
- **Staff Reallocation**
  With increased efficiency, Pam was able to reallocate staff to more critical areas, maximizing resource utilization.
- **Creation of a Centralized Call Center**
  By centralizing patient communication, she enhanced service delivery and improved patient satisfaction.
- **Operational Efficiency Gains**
  The clinic saved time and resources, resulting in a smoother experience for both staff and patients.
- **Strategic Leadership**
  Pam's leadership in implementing these changes empowered her to focus on greater strategic initiatives.

UMass Memorial Health | UMass Chan Medical School

CHRIS NAVIS

Before Chris, 7 West experienced severe staff turnover, negatively affecting morale and patient care. Through the idea system, Chris engaged caregivers who implemented ideas focused on patient experience, falls, and length of stay, including:

- ✔ Staff notification of patient meals
- ✔ Rowalker for pre-transplant patients
- ✔ Rounding with patient
- ✔ Adjusted Clinical Kidney Pathway

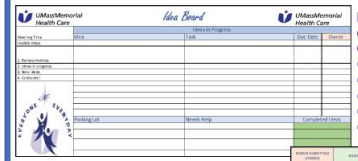
7 West has become a sought-after floor, known for its innovative culture and exceptional team collaboration.

EVOLUTION OF VIRTUAL BOARDS

VIRTUAL IDEA BOARD OPTIONS

Many of us have had to do our work a little differently as we've been remote due to the COVID-19 pandemic. Here are a few quick and easy tools to set up an electronic Idea Board for your teams to review on a virtual huddle.

EXCEL



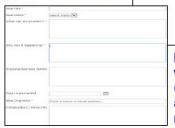
Excel can be used to create simple columns that align with the Idea Card:

- Idea Originator
- What's the problem?
- Why is it happening?
- Idea
- Date Implemented

Different tabs can be used for both new ideas and completed ideas. The Ancillary Applications team created a main Idea Board tab (above left) with additional tabs for more specific idea details.

SHAREPOINT

SharePoint lists are similar to Excel spreadsheets. You can upload existing spreadsheets to create

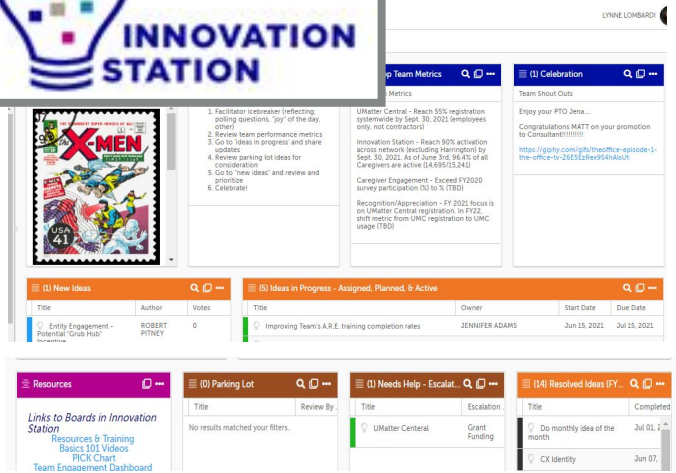


lists, or create one directly from SharePoint. Columns can align with the Idea Board card. Ideas can be submitted from grid view (above) or form view (left). Users can easily change the status of an idea (New, In Progress, Complete), and add more detail in the respective columns.

TRELLO

Trello is a free online tool that you'll need to create an account for. You can quickly add columns to align with an Idea Board, and simply drag and drop the ideas to the appropriate column as they go from New to Complete (or to parking lot/needs help). You can also assign users and due dates, and make quick idea updates within the card.

INNOVATION STATION



IMPACT MESSAGING EXAMPLE

We need You!

Now more than ever, we need you - our army of innovators - to call out ways to save money and operate more efficiently. We've made it easy to share your cost-saving ideas with us. Three cost-related flags have been added allowing you to tag an idea as:

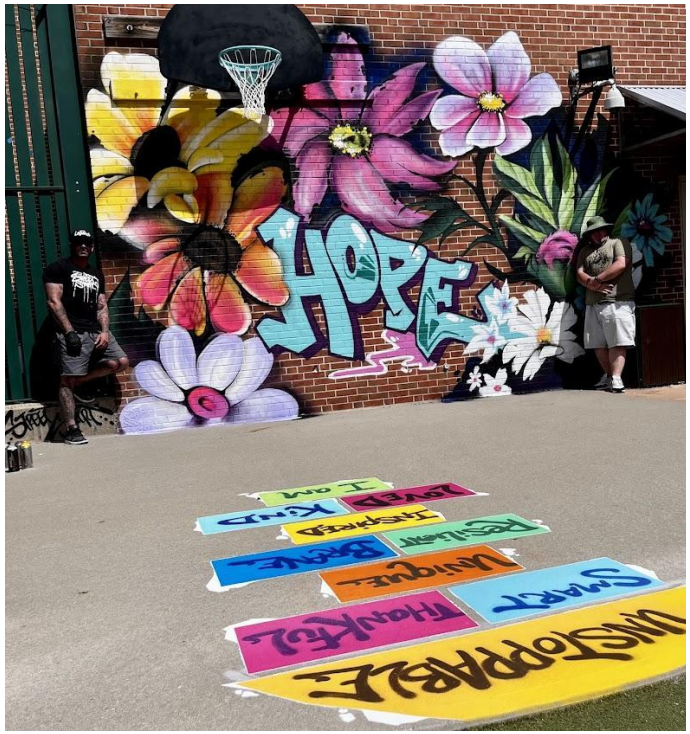
- Saves Money / Increases Revenue
- Green / Sustainable Idea
- Potential System Financial Benefit - Need Leadership Support

When you create a new idea, chose one or multiple tags from the new "Flag" drop-down list. If your idea will need help from leadership, chose "Potential System Financial Benefit" and the idea will be escalated to our Financial Recovery Workgroup for review.

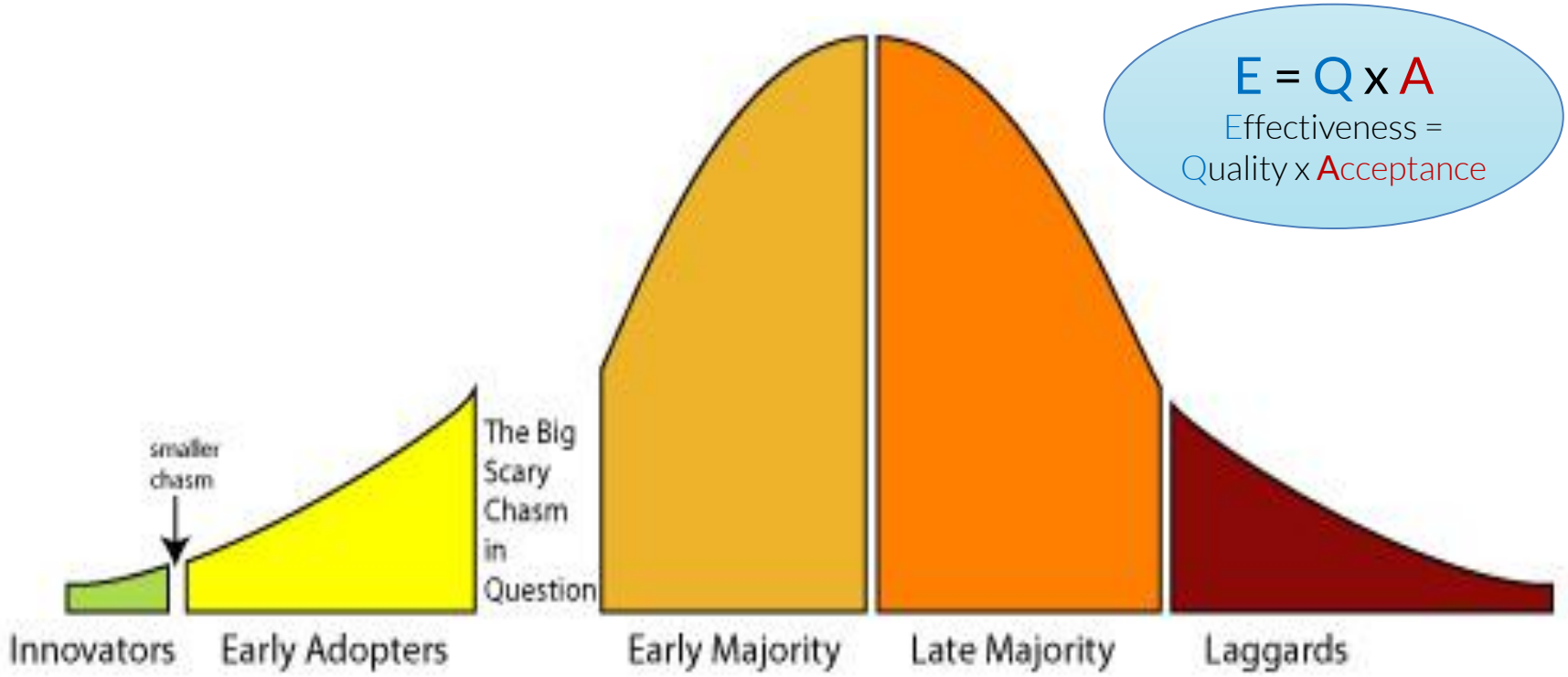
On the Hub -- Message From Eric: Next Steps Toward Financial Improvement

Continue

MORE GRANT EXAMPLES



MANAGE, DON'T AVOID REALITY



Geoffrey Moore's 'Crossing the Chasm' diagram
circa 1991

INNOVATION: A PROCESS WITHIN OUR MANAGEMENT SYSTEM

1. Strategic Planning and Execution
2. Annual Goal Setting, Alignment, and Performance Management
3. Continuous Daily Improvement
4. Large-Scale Improvement Events (Kaizen)
5. Standards of Respect
6. Operating Budget
7. Business Development and Capital Investment
8. System Development and Support Services
9. Philanthropy
10. Governance