

CDPH Guidance for Directorate Briefings

Standard work for briefing CDPH directorate and each other

By Tomás Aragón, version 2022-12-10

Introduction

The Directorate's priorities are CDPH (a) becoming a learning, healing, and impactful organization, (b) developing our people, and (c) tackling key public health challenges. **Lean** is "systematically developing people to solve problems and consuming the fewest possible resources *while* continuously improving processes to provide value to community members and prosperity to society." The lean DNA encodes for the following:

1. Respect for people (staff, community, client, patient, customer)
2. Continuous improvement (incremental and breakthrough) (improvement kata)
3. Scientific thinking, problem solving, and innovation (A3 thinking)
4. Management by Objectives and Key Results (OKRs)
5. Elimination of waste and undesired variability in inputs/processes, outputs, or outcomes
6. Being agile, adaptive, and responsive to meet challenges and opportunities

Standard work

In lean, **standard work** is "the agreed-upon, best-known, least wasteful way of doing the work today until a better way is found." Standard work provides a structure to communicate, train, practice, and deliver an expected sequence of tasks. Standard work becomes the basis or baseline for learning and continuous improvement. The templates below are the standard work for briefing the CDPH directorate. These are practical frameworks to organize your thinking.

Plan-Do-Study-Act (PDSA)

PDSA stands for Plan-Do-Study-Act. PDSA is the scientific method and we have been using it all our lives. PDSA thinking and problem solving is part of human nature: it is how we try things, learn, adapt, and improve. Of the five templates, two are organized using PDSA so one can see the process of planning, predicting, experimenting, learning, and improving.

Situation update

Situation updates are very concise and can be delivered on-the-spot orally, or in written form.

SBAR+ (template 1 of 5)

1. **Situation** ("Here's the situation.")
2. **Background** ("Here's some background.")
3. **Assessment** ("Here's what we learned.")
4. **Response so far** ("Here's what we did.")
5. **Readiness** ("Here's what we are doing to prepare or respond further.")
6. **Recommendations, if any** ("Here are our recommendations.")

Program, Office, or Center introduction or update (template 2 or 5)

1. What are your strategic priorities? For your top strategic priority, what are your **Objectives and Key Results** (OKRs)? (see below)
2. What **key challenges** or **problems** are your teams tackling. (see below)

Objectives and Key Results (goal setting best practice) (template 3 of 5)

Setting and achieving goals is part of all management and improvement frameworks (ICS, lean, RBA, planning, etc.). For example, in the Incident Command System (ICS), an early step is to set Objectives for an operational period. Because of its central importance, we are using a best practice for *goal setting and tracking* called “Objectives and Key Results.” OKRs is an updated version of “management by objectives” (around since the 1950s) and is used by organizations like Google and the Gates Foundation. *For your top priorities, answer two questions:*

1. **What** do we want to **accomplish**? (**Objectives**). Good Objectives are significant, concrete, action-oriented, and inspirational.
2. **How** do we **measure progress** and **success**? (**Key Results**). Good Key Results are specific and time-bound, aggressive yet realistic, and measurable and verifiable.

Then, meet at a regular cadence to *review* progress on Key Results, and *adjust* activities to stay on track towards achieving your Objectives. See <https://www.whatmatters.com/get-started>.

Problem solving (lean A3) or collective impact approach (RBA)

Lean A3 thinking/reporting (template 4 of 5)^a

PDSA	No.	Components (steps need not be chronological)
Plan	1	Problem statement (does not include causes or solutions)
	2	Background
	3	Current condition
	4	<u>Objectives</u> and <u>Key Results</u> ^b (OKRs) ^c
	5	Analysis (gaps and root causes)
	6	Proposed countermeasures
Do	7	Implementation plan
Study and Act	8	Improvement kata (PDSA cycles of experiments, learning and improvement)

^a See 10 min video from Stanford University: <https://www.youtube.com/watch?v=rtvia0ci12I>

^b Target conditions are KRs that are specific and time-bound, aggressive yet realistic, and measurable and verifiable

^c See Objective and Key Results (OKRs): <https://www.whatmatters.com/get-started>

Results-Based Accountability (RBA) (template 5 of 5)^d (for collective impact projects)^e

PDSA	No.	Components
Plan	1	What is the “end”? (<u>Objectives</u>)
	2	How are we doing? (<u>Key Results</u> ; review trends and forecasts)
	3	What is the Story Behind the Curve of the baseline? (root cause analysis)
	4	Who are partners who have a role to play in Turning the Curve?
	5	What works to Turn the Curve? (evidence-based/informed)
	6	What do you propose to do to Turn the Curve? (countermeasures)
Do	7	Implementation plan
Study and Act	8	Improvement kata (PDSA cycles of experiments, learning and improvement)

^d See <https://clearimpact.com/resources/publications/results-based-accountability-guide/>

^e For “collective impact” see <https://collectiveimpactforum.org/what-is-collective-impact/>