

What is it?

This spreadsheet is designed to be used in conjunction with the The Productive Operating Theatre (TPOT) box set to help you to plan the tasks and activities required for successful implementation.

Please note, this is **NOT** a comprehensive programme plan. This is intended to be a supporting resource to help you develop your own plan.

Who is it for?

The spreadsheet is intended as a tool for programme managers & implementation leads.

How do I use it?

The spreadsheet contains a series of linked pages which contain resources to aid your implementation. The three main pages are shown below:

Programme Overview

- This tab provides an overview of the key events and milestones in the programme. It highlights the aims for each module and, more importantly, the re-requisites for commencement

Programme Tasks

- The Programme Tasks tab provides an overview of the key actions required for each section of the programme together with helpful tips and links to useful tools and resources. It also contains references to the module guides.
- This sheet contains links to each of the other tabs and is a useful navigation point when looking for anything within this tool.

Programme Timeline


- This contains a sample timeline. You can either use this as a guide to planning your own programme timeline, or you can edit it to suit your own needs.

These tabs can be found at the top of each page.

Click the tabs to quickly navigate between pages.

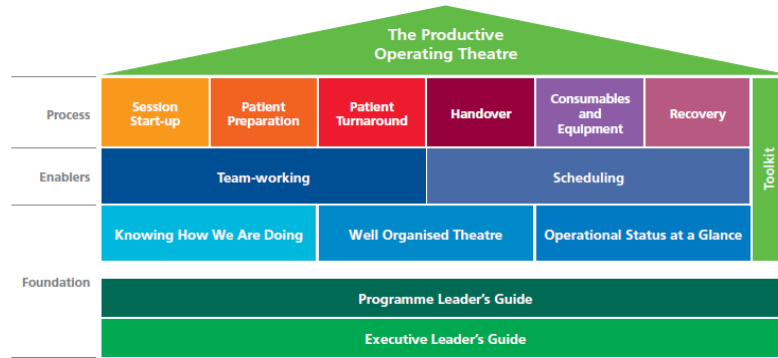
In addition to these pages, you will find a number of additional resources, tools, templates and guides on the remaining tabs, many of which are editable for your convenience.



This symbol () appears frequently throughout this tool. If you hold your cursor over it, additional information will appear.

Every effort has been made to ensure that this resource is print friendly and adaptable to your needs. If you experience any difficulties using it, or have a suggestion to improve it please contact theatres@institute.nhs.uk to let us know.





Overview of key programme events and milestones

Event/Milestone	Aim	Pre-requisites	Key Outputs
Programme/Executive Lead preparation	<ul style="list-style-type: none"> To ensure good understanding and commitment prior to commencing programme 	<ul style="list-style-type: none"> Business Plan or Project Initiation Document signed off 	<ul style="list-style-type: none"> Engaged and informed Executive and Programme leads
Programme team formation	<ul style="list-style-type: none"> Recruitment of Programme team Establish programme infrastructure 	<ul style="list-style-type: none"> Clear agreement to proceed from Executive Board 	<ul style="list-style-type: none"> Programme team established Clear roles and responsibilities First programme team meeting date set Draft programme plan Showcase theatres selected
Establish the steering group	<ul style="list-style-type: none"> Steering group established and first meeting held 	<ul style="list-style-type: none"> Steering group engaged Draft Programme plan and timescales Key Resources identified 	<ul style="list-style-type: none"> Clear structure of steering group Terms of reference Agree plans and timescales Agree resources Agree funding Set meeting dates Provisional dates agreed for workshops
Visioning workshop	<ul style="list-style-type: none"> To create a local shared vision for your operating theatre suite that will underpin the work of the programme 	<ul style="list-style-type: none"> Identification of date when MDT can attend Engagement of skilled facilitator 	<ul style="list-style-type: none"> Clear shared vision created and understood by all Engagement of the team What are the barriers to the vision? Identify champions to actively support the programme
Trust board workshop	<ul style="list-style-type: none"> Engagement and ongoing support and commitment from the trust board 	<ul style="list-style-type: none"> Preparation of data and information required Executive sponsor preparation 	<ul style="list-style-type: none"> Clear vision Active support for programme Commitment to resource Commitment to participate in theatre visioning session Commitment to visits / walkabouts
Knowing How We Are Doing and Measures workshop	<ul style="list-style-type: none"> To understand current state and measure progress of improvements during the programme Identification of core measures for use during the programme 	<ul style="list-style-type: none"> Shared vision created and understood by all Understanding of your information system and what it can deliver Clarity of what you are already measuring Actively seek support from the information department Ongoing active support from information and IT departments 	<ul style="list-style-type: none"> Identified and agreed programme measures How measures will be collected analysed and reviewed Engagement of multidisciplinary team in Knowing How We Are Doing Training for team in purpose of measures Understanding how measurement drives behaviour and how to use facts / data to drive improvement How to set up a visual Knowing How We Are Doing board and review system Understanding of how you are doing in relation to the overall programme measures
Commencement of a Well Organised Theatre and Operational Status at a Glance	<ul style="list-style-type: none"> To provide a solid foundation on which to base further improvement 	<ul style="list-style-type: none"> Knowing How We Are Doing established and its importance to the programme as a whole and each module understood by all 	<ul style="list-style-type: none"> Well Organised Theatre <ul style="list-style-type: none"> Improve workplace organisation Understand of the 5S methodology Design their areas to support their processes Operational Status at a Glance <ul style="list-style-type: none"> Introduce visual management to theatres Understand why real time measurement is important Develop an Operational Status at a Glance system Identify measures
Commencement of enabler modules - Team-working and scheduling	<ul style="list-style-type: none"> Team-working <ul style="list-style-type: none"> Improved safety by reducing errors and create a better working atmosphere for the theatre team Scheduling <ul style="list-style-type: none"> Work with those involved in scheduling theatre lists to create a reliable and efficient scheduling process 	<ul style="list-style-type: none"> For foundation modules to be embedded 	<ul style="list-style-type: none"> Team-working <ul style="list-style-type: none"> Teams conducting brief, debrief and the checklist Teams using tools such as SBAR and PACE Scheduling <ul style="list-style-type: none"> improved scheduling process that produces reliable, achievable lists in a timely manner
Process modules	<ul style="list-style-type: none"> Understand, improve and standardise six key processes, the combined results will have a high impact on achieving the programme aims 	<ul style="list-style-type: none"> All foundation modules and enablers to be embedded into daily practice 	<ul style="list-style-type: none"> Safe, reliable processes that have eliminated unnecessary delays and waste, improving the experience of both patients and staff

Event	Task No.	Programme Task List	Links to useful tools (Click links to open)	Other Helpful Resources
Programme/Executive Lead's Preparation	1.	Read the TPOT Programme Leaders guide and Executive Leaders guide	Programme Overview	Programme Leaders Guide Executive Leaders Guide
	2.	Create your 'Elevator Pitch' for your programme		
	3.	Identify an appropriate Executive Lead (in not already in place)		
	4.	Ensure your Executive lead understands the programme	Download Leading Improvement ILG	Executive Leaders Guide
	5.	Set up weekly meetings with your Executive Lead	Meetings - Toolkit (page 7)	
	6.	Define responsibilities with your Executive Lead	Roles & Responsibilities	
Programme Team formation and preparation	7.	Agree resource requirements for Programme Team with Executive Lead		Programme Leaders Guide (page 23) Executive Leaders Guide (page 25; 29-31)
	8.	Recruit Improvement Facilitator		Programme Leaders Guide (page 26)
	9.	Recruit Clinical Leads		Programme Leaders Guide (page 27)
	10.	Recruit Information analyst		Programme Leaders Guide (page 28)
	11.	Establish first date for programme team meeting	Meetings - Toolkit (page 7)	
	12.	Identify showcase theatres	Select a showcase theatre	Programme Leaders Guide (page 42-45)
Establish steering group	13.	Establish steering group membership	Suggestions for involving others	Programme Leaders Guide (Pages 57-61) Executive Leaders Guide (Pages 33-35)
	14.	Set date for first Steering group meeting	Meetings - Toolkit (page 7)	
	15.	Agree terms of reference		Executive Leaders Guide (Page 34)
	16.	Agree resource requirements for the implementation		
	17.	Agree funding for implementation		
	18.	Agree frequency and dates of future meetings		
Programme preparation	19.	Set provisional dates for Visioning, Trust board and KHWD workshops		Programme Leaders Guide (Pages 62-77) Executive Leaders Guide (Pages 37-45) Knowing How We are Doing (Page 30)
	20.	Discuss ISP with team and agree needs	TPOT support	
	21.	Project plan and timeline agreed	Programme Timeline	Monthly Module Action Planner
	22.	Establish your communications strategy	Guide to Stakeholder Analysis [NHS Institute website]	Programme Leaders Guide (Pages 51-55)
Visioning workshop	23.	Link with other Productives		
	24.	Complete the Sustainability model	Sustainability tool [NHS Institute website]	NHS Institute Sustainability Model & Guide
Trust board workshop	25.	Book venue & send invitations		Programme Leaders Guide (Pages 63 - 65)
	26.	Run Visioning workshop		Programme Leaders Guide (Pages 67 - 74)
	27.	Communicate Vision		Programme Leaders Guide (Pages 75 - 76)
Knowing How We Are Doing	28.	Book time slot in Trust Board meeting		Executive Leaders Guide (Pages 39 & 42)
	29.	Identify and collect information for presentation		Executive Leaders Guide (Pages 40 - 41)
	30.	Arrange Leadership walkround	Guide to Leadership walkrounds [NHS Institute website]	
	31.	Run Trust Board Workshop		Executive Leaders Guide (Pages 43 - 45)
	32.	Communicate outcomes		
Well Organised Theatre	33.	Plan module	Monthly Module Action Planner	Knowing How We Are Doing (Page 27)
	34.	Book venue for measures workshop & send invitations		Knowing How We Are Doing (Pages 10 - 11; 29 - 35)
	35.	Run measures workshop		Knowing How We Are Doing (Pages 36 - 39; 93 - 101)
	36.	Confirm Collection & Display for each measure	Measures Checklist	Knowing How We Are Doing (Pages 41 - 59; 104 - 105)
	37.	Collect baseline data and set ongoing measurement procedures		Knowing How We Are Doing (Pages 61 - 73; 83 - 87)
	38.	Set up regular review meetings		Knowing How We Are Doing (Pages 75 - 81; 108)
Operational Status At A Glance	39.	Plan module & hold a mini-measures session	Monthly Module Action Planner	Well Organised Theatre (Pages 15 - 19)
	40.	Plan the change	5S Game (Toolkit - Pages 73 - 83) Photographs (Toolkit - Pages 61 - 65) Spaghetti Diagrams (Toolkit - Pages 125 - 127)	Well Organised Theatre (Pages 21 - 41)
	41.	Do the change	5S Inventory Sheet	Well Organised Theatre (Pages 43 - 61)
	42.	Study the new layout		Well Organised Theatre (Pages 63 - 67)
	43.	Act on the learning	Scale Up	Well Organised Theatre (Pages 69 - 85)
	44.	Repeat steps 39 - 42	WOT Audit Tool	Audit Planner (Toolkit - Pages 21 - 23)
Team-Working	45.	Plan module & hold a mini-measures session	Monthly Module Action Planner	Operational Status At A Glance (Page 13 - 21)
	46.	Plan the change	Activity Follow (Toolkit - Pages 31 - 45) Interviews (Toolkit - Pages 55 - 59) Photographs (Toolkit - Pages 61 - 65)	Operational Status At A Glance (Pages 23 - 39)
	47.	Do the change		Operational Status At A Glance (Pages 41 - 49)
	48.	Study the change		Operational Status At A Glance (Pages 51 - 57)
	49.	Act on the learning	Scale Up	Operational Status At A Glance (Pages 59 - 61)
	50.	Repeat steps 45 - 48		
Team-Working	51.	Organise the Team-Working session	Monthly Module Action Planner	Team-Working (Pages 21 - 23)
	52.	Run the Team-Working session		Team-Working (Page 25)
	53.	Plan implementation of brief/debrief & hold a mini-measures session	Measures Checklist	Team-Working (Pages 27 - 33)
	54.	Plan the change: Select a team, raise awareness & identify champions		Team-Working (Pages 44 - 47)
	55.	Plan the change: Choose an idea to implement		Team-Working (Pages 47 - 57)
	56.	Do the change	Weekly Module Action Planner	Team-Working (Pages 58 - 61)
	57.	Study the change		Team-Working (Pages 62 - 65)
	58.	Act on the learning		Team-Working (Pages 66 - 69)
	59.	Repeat steps 53 - 56		
	60.	Plan implementation of SBAR & hold a mini-measures session	Measures Checklist	Team-Working (Pages 27 - 33)
	61.	Plan the change	Weekly Module Action Planner	Team-Working (Pages 104 - 111)
	62.	Do the change		Team-Working (Pages 112 - 115)
	63.	Study the change		Team-Working (Pages 116 - 119)
	64.	Act on the learning	Scale Up	Team-Working (Pages 120 - 127)
	65.	Repeat steps 61 - 64		
Scheduling	66.	Plan approach to Session utilisation & hold a mini-measures session	Monthly Module Action Planner	Scheduling (Pages 19 - 27)
	67.	Plan the change: Select a team		Scheduling (Pages 34 - 36)
	68.	Plan the change: Analyse Demand & Capacity	Demand & Capacity Guide [NHS Institute website]	Scheduling (Pages 37 - 39)
	69.	Plan the change: Collect & Understand your data		Scheduling (Pages 41 - 42)
	70.	Plan the change: Review ideas & select one	Weekly Module Action Planner	Scheduling (Pages 43 - 51)

Scheduling	71.	Do the change		Scheduling (Pages 52 - 57)
	72.	Study the change		Scheduling (Pages 58 - 61)
	73.	Act on the learning	Scale Up	Scheduling (Pages 62 - 67)
	74.	Repeat steps 66 - 71		
	75.	Plan approach to List utilisation & hold a mini-measures session	Measures Checklist	Scheduling (Pages 19 - 27; 69 - 75)
	76.	Plan the change: Select a team		Scheduling (Page 77)
	77.	Plan the change: Collect & Understand your data		Scheduling (Pages 78 - 84)
	78.	Plan the change: Review ideas & select one	Weekly Module Action Planner	Scheduling (Pages 84 - 91)
	79.	Do the change: Process mapping	Process Mapping Overview [NHS Institute website]	Scheduling (Pages 92 - 95) Process mapping (Toolkit - pages 85 - 91)
	80.	Do the change: Test the idea		Scheduling (Pages 97 - 103)
	81.	Study the change		Scheduling (Pages 104 - 107)
	82.	Act on the learning	Scale Up	Scheduling (Pages 108 - 115)
	83.	Repeat steps 76 - 82		

Process Modules	The order of implementing the process modules is down to you and will likely be guided by the outcomes of your visioning session. Each module will run in a similar fashion and should follow these steps			
	1.	Read module & plan the work to be done	Monthly Module Action Planner	Process module handbooks
	2.	Run a mini-measures session	Measures Checklist	Process module handbooks
	3.	Plan the change: Select a team		Process module handbooks
	4.	Plan the change: Understand your current state	Weekly Module Action Planner	Process module handbooks
	5.	Do the change		Process module handbooks
	6.	Study the change		Process module handbooks
	7.	Act on the learning	Scale Up	Process module handbooks
	8.	Repeat the PDSA cycle for each new idea	Process Module PDSA cycle	

Team-Working	<p>51. Organise the Team-Working session</p> <p>52. Run the Team-Working session</p> <p>53. Plan implementation of brief/debrief & hold a mini-measures session</p> <p>54. Plan the change: Select a team, raise awareness & identify champions</p> <p>55. Plan the change: Choose an idea to implement</p> <p>56. Do the change</p> <p>57. Study the change</p> <p>58. Act on the learning</p> <p>59. Repeat steps 53 - 56</p> <p>60. Plan implementation of SBAR & hold a mini-measures session</p> <p>61. Plan the change</p> <p>62. Do the change</p> <p>63. Study the change</p> <p>64. Act on the learning</p> <p>65. Repeat steps 53 - 56</p>		<p>The Gantt chart for the Team-Working section shows a sequence of tasks. Task 51 is the longest bar at the top. Task 52 is a shorter bar starting after 51. Task 53 is a bar starting after 52. Task 54 is a bar starting after 53. Task 55 is a bar starting after 54. Task 56 is a bar starting after 55. Task 57 is a bar starting after 56. Task 58 is a bar starting after 57. Task 59 is a bar starting after 58. Task 60 is a bar starting after 59. Task 61 is a bar starting after 60. Task 62 is a bar starting after 61. Task 63 is a bar starting after 62. Task 64 is a bar starting after 63. Task 65 is a bar starting after 64.</p>	
	Scheduling	<p>66. Plan approach to Session utilisation & hold a mini-measures session</p> <p>67. Plan the change: Select a team</p> <p>68. Plan the change: Analyse Demand & Capacity</p> <p>69. Plan the change: Collect & Understand your data</p> <p>70. Plan the change: Review ideas & select one</p> <p>71. Do the change</p> <p>72. Study the change</p> <p>73. Act on the learning</p> <p>74. Repeat steps 66 - 71</p> <p>75. Plan approach to List utilisation & hold a mini-measures session</p> <p>76. Plan the change: Select a team</p> <p>77. Plan the change: Collect & Understand your data</p> <p>78. Plan the change: Review ideas & select one</p> <p>79. Do the change: Process mapping</p> <p>80. Do the change: Test the idea</p> <p>81. Study the change</p> <p>82. Act on the learning</p> <p>83. Repeat steps 66 - 71</p>		<p>The Gantt chart for the Scheduling section shows a sequence of tasks. Task 66 is a bar starting after 59. Task 67 is a bar starting after 66. Task 68 is a bar starting after 67. Task 69 is a bar starting after 68. Task 70 is a bar starting after 69. Task 71 is a bar starting after 70. Task 72 is a bar starting after 71. Task 73 is a bar starting after 72. Task 74 is a bar starting after 73. Task 75 is a bar starting after 74. Task 76 is a bar starting after 75. Task 77 is a bar starting after 76. Task 78 is a bar starting after 77. Task 79 is a bar starting after 78. Task 80 is a bar starting after 79. Task 81 is a bar starting after 80. Task 82 is a bar starting after 81. Task 83 is a bar starting after 82.</p>

Roles & Responsibilities

Executive Lead	
Is responsible for:	Is not responsible for:
Being visible as the person responsible for TPOT within the organisation Chairing and leading the TPOT steering group Briefing the Executive Team Overseeing planning and progress Securing necessary resources Coaching Programme Lead Establishing a robust governance structure Ensuring prominence and strategic fit with organisational objectives	Micro-managing teams Leaving TPOT entirely to the Programme Lead

Programme Lead	
Is responsible for:	Is not responsible for:
Programme Planning (Implementation, communications, strategy & resourcing) Training and Coaching Managing expectations Arranging and leading key events Leading Programme Team Tracking Progress & Quality Enabling Theatre Teams Ensuring Executive Leader is up to date, escalating issues and challenges as required Engaging the MDT Lead the planning and measurement phase of each stage	Work outside the scope of the Programme Micro-managing Theatres

Improvement Facilitator	
Is responsible for:	Is not responsible for:
Spread the knowledge and use of improvement tools Contributing to planning and measures Thinking creatively Help to develop a culture for continuous improvement Motivating team Supporting Champions in their work Recording progress Collecting and sharing data Organising and doing	Securing resources Managing the areas of change Directing change without the knowledge of the Programme Leader

Clinical Lead (Both Surgical & Anaesthetic)	
Is responsible for:	Is not responsible for:
Committing time to the Programme Attending Steering Group and programme team meetings when required Promoting the programme to other Clinicians Supporting the implementation through their own practice e.g. Piloting briefings	Being an passive member of the team

Information Analyst	
Is responsible for:	Is not responsible for:
Identifying what information is already routinely collected Work with the teams to develop measures Identify how measures will be collected ongoing Develop ways to analyse data and present findings Educating the team about the use of information	Being responsible for data collection

Champion	
Is responsible for:	Is not responsible for:
To be ambassadors of the programme To show commitment To promote the work Engaging other staff To show visibility in theatres Help to implement the changes on the ground Deal with challenging behaviour from peers Develop skills in the use of improvement tools	Being a passive member of the team

The Productive Operating Theatre

Building teams for safer care™

Departments you should involve		
Department	Module	Likely activity
Facilities	Knowing How We Are Doing Operational Status at a Glance Well Organised Theatre	Painting, floor marking, shelves, display boards, cleaning
Information	Executive Leader's Guide Knowing How We Are Doing Measures for all modules	Support developing, collecting, analysing and reviewing measures
Sterile services (including off-site teams)	Consumables and Equipment	Stocking, labelling, developing and agreeing to new ways of working
Procurement and supplies	Well Organised Theatre Consumables and Equipment	Stocking levels
Pharmacy	Consumables and Equipment	Stocking, labelling, developing and agreeing to new ways of working
Surgical wards	Scheduling Patient Preparation Handover Recovery	Engagement with developing and putting into practice new procedures
Finance	Executive Leader's Guide Knowing How We Are Doing Return on Investment	Providing information and costs
Medical secretaries / central admissions	Scheduling	To understand current state and develop and implement new processes
Governance	Knowing How We Are Doing Process modules	Guidance on governance issues regarding filming, taking photos or use of data
Communication	Executive Leader's Guide Programme Leader's Guide	Help to develop and implement a communications plan

Support Opportunities available from the NHS Institute



Monthly module action planner





Theatre:

















Module action plan for:

NO.	TASK	WHO	WHEN	DATE																											
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NO.	TASK	WHO	WHEN	DATE																											
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Weekly Module Action Planner

 = Understood
  = Underway
  = Complete
  = Sustained

	Action	Who	When	Progress	Initials
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					

5S Audit Tool	WOT Lead/Champion	Date planned	Date completed	Measured improvements	Owner
Theatres					
Theatre 1					
Anaesthetic room					
Prep room					
Sluice					
Desk					
Theatre 2					
Anaesthetic room					
Prep room					
Sluice					
Desk					
Theatre 3					
Anaesthetic room					
Prep room					
Sluice					
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Theatre 4					
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Theatre 8					
Anaesthetic room					
Prep room					
Sluice					
Desk					
Theatre 9					
Anaesthetic room					
Prep room					
Sluice					
Desk					
Theatre 10					
Anaesthetic room					
Prep room					
Sluice					
Desk					
Store rooms					
Store room 1					
Store room 2					
Store room 3					
Main Store Room					
Ortho Tray Room					
Ortho Pros Room					
DSU					
Male Side					
Nursing Station					
Female Side					
Nursing Station					
Sluice					
Quiet Room					
Bathrooms Female					
Bathroom Male					
Recovery					
Paeds					
Main					
Blood gas station					
Sluice					

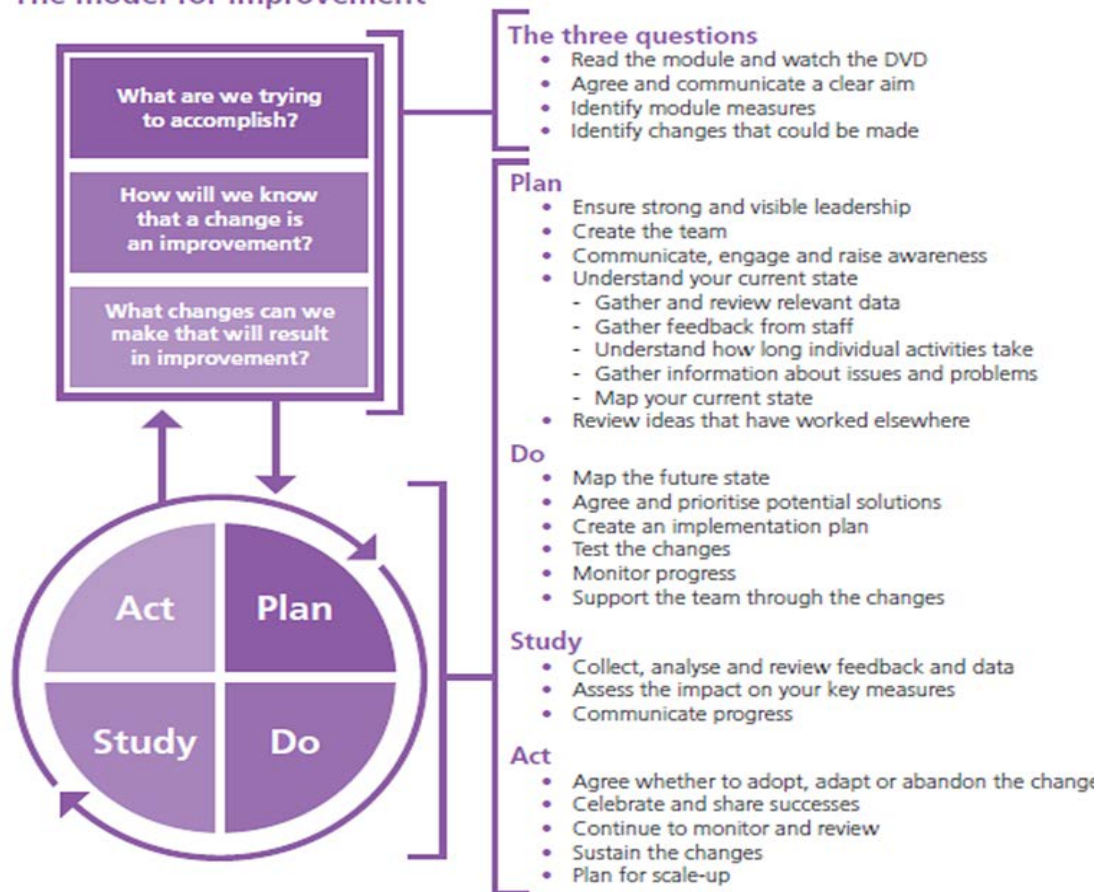
CD Trolley					
Crash Trolley					
HDU Trolley					
Nursing Station					

The Productive Operating Theatre

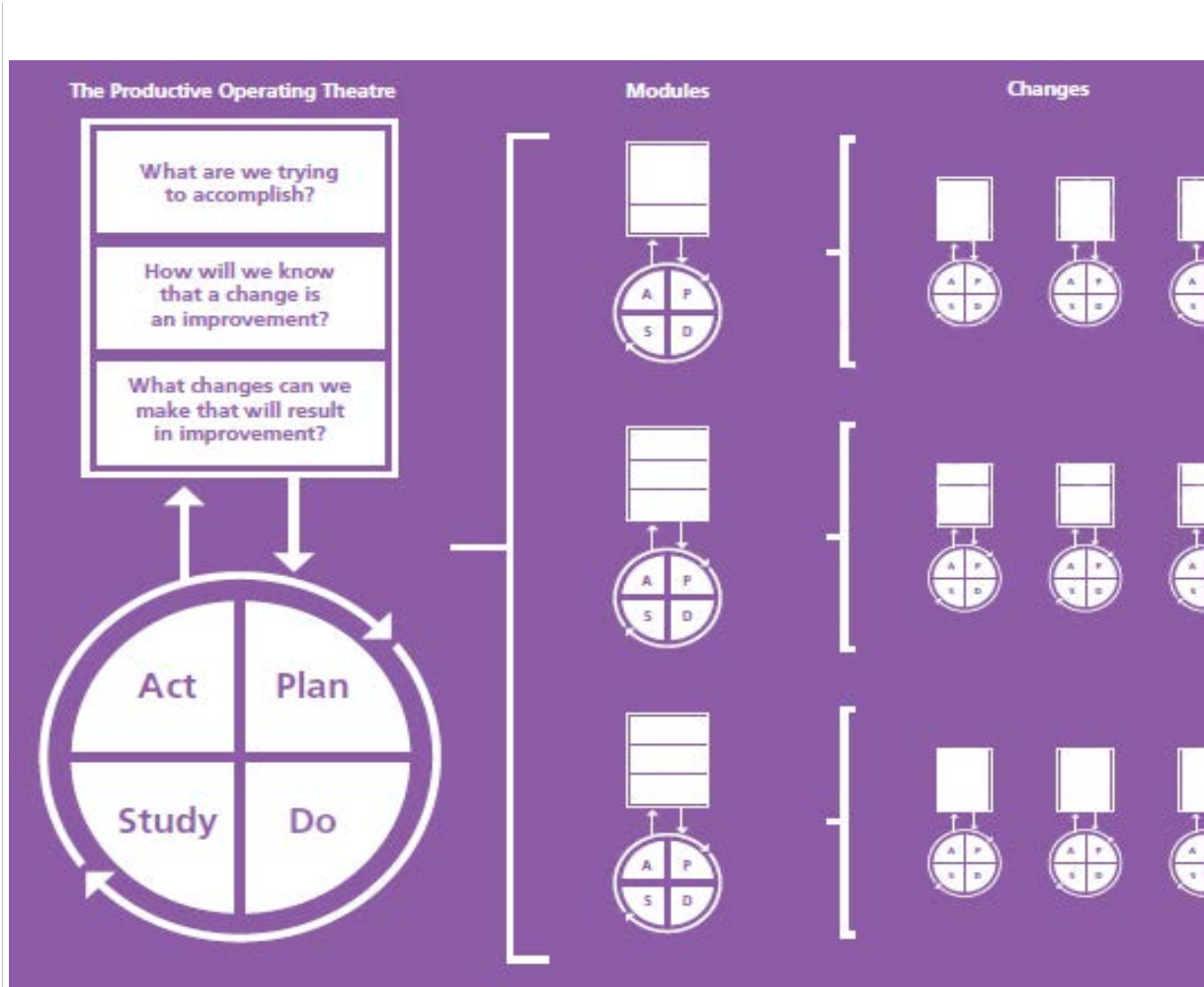
Building teams for safer care™

Each process module is structured to take you through the model for improvement. Within the model for improvement. The cumulative impact of these changes come together to a successful implementation.

The model for improvement



each module you will implement many small changes, developing and testing each one through smaller changes to achieve the objectives of the different process modules. For each module follow this process to achieve



PART 1: Measures Setup

Measure description	Measure name
	Why is it important? <small>(Provides justification and any links to organisation strategy)</small>
	Who owns this measure? <small>(Person responsible for making it happen)</small>
Measure definition	What is the definition? <small>(Spell it out very clearly in words)</small>
	What data items do you need?
	What is the calculation?
	Which groups are to be covered?
Goal setting	What is the numeric goal you are setting yourselves?
	Who is responsible for setting this?
	When will it be achieved by?

PART 2: Measurement process

Collect	Is the data available? <small>(Currently available / Available with minor changes / Prospective collection needed)</small>
	Who is responsible for data collection?
	What is the process of collection?
Analyse	Who is responsible for the analysis?
	How often is the analysis completed?
	What is the process for presenting results?
Review	Where will decisions be made based on results?
	Who is responsible for reviewing?