

5^S Assessment and Planning Checklist

Step	Who is Involved	Outcome	Tools/Forms	Status
1. Select area for 5S	Sponsor, Owner, Lean Office Representative	Decision to allocate resources for 5S, timeline established	<ul style="list-style-type: none"> • 5S Charter Development Worksheet 	
2. Draft the Charter Package	Coach, Owner	Draft Charter Package	Charter Package: <ul style="list-style-type: none"> • 5S Event Timeline • 5S Event Roles • Charter • Task Log • 5S Measurement Plan • Communication Plan • Meeting Schedule • Floor Plan of 5S target area 	
3. Conduct Assessment and Planning Meeting	Coach, Owner, Sponsor	Approval of Charter Package	<ul style="list-style-type: none"> • Draft of Charter Package (all forms above in draft) • Assessment and Planning Meeting Guidelines 	
4. Weekly Planning Meetings	Owner, Sponsor, Coach as needed	Weekly progress and readiness checks; actions completed and updated	<ul style="list-style-type: none"> • Task Log • Communication Plan • Charter • 5S Measurement Plan 	
5. Meet with Resource Representatives	Owner, Coach, Resource Representatives	Plans & Projects for pre-workshop actions and workshop support. Includes: Facilities, Housekeeping, Information Technology, Finance, etc.	<ul style="list-style-type: none"> • Task Log 	

5^S Assessment and Planning Checklist *(cont'd)*

Step	Who is Involved	Outcome	Tools/Forms	Status
6. Department Orientation	Owner, Coach as needed	Area staff & Stakeholders informed and educated	<ul style="list-style-type: none"> • Presentation material in 5S manual 	
7.5S Communication Board in Place	Owner, Coach as needed	Continued updating and communication for Staff re: 5S activity	<ul style="list-style-type: none"> • Sample Communication Board in 5S manual 	
8. Logistics for 5S Workshop	Owner, Coach	Prepared for the 3 day 5S Workshop	<ul style="list-style-type: none"> • 5S Workshop Logistics Checklist 	
9. Final Check	Owner, Coach, Sponsor	Go/No-Go Decision	<ul style="list-style-type: none"> • Criteria established during Assessment and Planning meeting for Go/No-Go decision 	

5^S Charter Development Worksheet

Steps	Questions	Notes and Decisions
<p>1) Establish 5S target areas</p> <p><u>Strategy:</u> Find areas that will show remarkable success and give teams experience with 5S.</p>	<ul style="list-style-type: none"> • What is the area where there are bottlenecks? • What area creates frustration and wasted time? • Which areas have clear boundaries and ownership? • Is this a common use or single use area? • How much resistance will be involved? • Who will need to be on board? • How much time do you and potential team members have? • What are the measurable sources of waste for improvement? • Do these improvement measures support organizational/area goals? 	
<p>2) Determine the time commitment estimates for the target area and establish dates for the event.</p> <p><u>Strategy:</u> Determine the extent of 5S activity for this to be successful.</p>	<ul style="list-style-type: none"> • How large is the area? • How many people can do 5S work in this area without getting in each other's way? • How long would it take to conduct: Sort? Simplify? Sweep? • How many people would need to give input to agree to standardization? • Is the potential outcome worth the resources required? • What lead times are needed for team scheduling, ordering special supplies, etc? • Are there any slow times or peak activity times to consider - daily, weekly, seasonal? 	
<p>3) Determine resource requirement estimates for the area</p> <p><u>Strategy:</u> Consider detailed requirements to adequately complete the 5S activity.</p>	<ul style="list-style-type: none"> • What additional equipment will be needed? • What are potential issues for handling items in the area, e.g. sharing or ownership with other departments? • What maintenance/facilities help can you anticipate? 	

5^S Charter Development Worksheet *(cont'd)*

Steps	Questions	Notes and Decisions
<p>4) Select the team</p> <p><u>Strategy:</u> Your team is your best resource; assign members that best know the area and can most benefit from the experience.</p>	<ul style="list-style-type: none"> • Who works in the area? • Who complains the most? • Who could be a champion for the results? • Is it possible to include members from associated groups? 	
<p>5) Determine the Resource Representatives and Stake Holders</p> <p><u>Strategy:</u> Early identification of the support you will need for the event itself, as well as for successful implementation.</p>	<ul style="list-style-type: none"> • Who interfaces with these areas? Consider users and suppliers that have a stake in the changes. • What specific resource support will you need for each of the 5S Steps – Sort, Simplify, and Standardize especially? • Who can give you a valuable, informed opinion regarding the changes? 	
<p>6) Identify potential issues and a plan for resolution</p> <p><u>Strategy:</u> Anticipate potential situations that are likely to surface; identify long-standing situations that will require resolution.</p>	<ul style="list-style-type: none"> • Can the issue be resolved by the Area Owner and/or Sponsor? • Are there issues that need to be resolved at the Leadership level? How will Leadership be informed? • Who else will need to be on board? 	
<p>7) Identify Expectations and Measures</p> <p><u>Strategy:</u> Align with organizational measures; e.g. patient safety or cost reductions</p>	<ul style="list-style-type: none"> • What needs to change in the area? • What is the vision for the work area after the 5S? • How can we measure the change to show success? • What baseline data do we have? • What baseline data do we need to collect? 	

55 Workshop Team Charter

SELECTED 5S AREA:

SPONSOR:

AREA OWNER:

5S COACH:

MEETINGS	DATE	TIME	LOCATION	SPONSOR	OWNER	COACH	TEAM	RESOURCE REPS	STAKE-HOLDERS
DEPT ORIENTATION				Optional	X	X (or designee)	X		Invited
KICK-OFF				X	X	X	X	Invited	Invited
WORKSHOP				As needed	X	X	X	As needed	As needed
DAILY CHECK-IN				X	X	X	X	As needed & Invited	Invited
SUSTAINING MTG				As needed & Invited	X	X			
REPORT OUT	LOCAL			X	X	X	X	Invited	Invited
	ORG-WIDE			X	X	X	X (as available)	Invited	Invited

TEAM MEMBERS:

RESOURCE REPS:

STAKEHOLDERS:

WORKSHOP OBJECTIVES:

CURRENT MEASURES:

TARGET MEASURES:

5^S Measurement Plan

5S Area:	5S Workshop Dates:
Owner:	30 Day Audit Date:
Sponsor:	60 Day Audit Date:
Coach:	90 Day Audit Date:

What	Who/How	Goals	Review/Analysis
<i>What are we measuring?</i>	<i>Who collects data? How is it collected? How often?</i>	<i>How will the data be used? What are our targets?</i>	<i>Who reviews and analyzes the data? How often?</i>

5^s Sustaining Checklist

Step	Who is Involved	Outcome	Tools and Forms	Status
1. Complete 5S Sustainability Plan	Coach and Owner	Data and measures collected and analyzed	5S Sustaining Plan	
2. Create Audit and Data collection forms	Owner, Coach support	Tools to support sustaining	Customized for situation	
3. Design data analysis and issue resolution process	Owner, Coach support	Process to sustain change, manage with data	Customized for situation	
4. Update task list for post-5S	Owner	Sustaining project management	Task Log of Post 5S	
5. Review Sustaining Plan, forms and Task Log with Sponsor	Owner	Approval and support for sustaining		
6. Conduct daily audits/data collection for <i>minimum</i> of 30 days. Continue as needed to support the system.	Owner, Staff	Data to support	Forms created for data collection and daily audits	
7. Analyze collected information. Post results on 5S Communication Board. Discuss results and problem solve using established issue resolution process.	Owner, Staff	Managing changes and sustaining system with data		
8. Schedule and conduct 30, 60, and 90 day audits. Review with sponsor.	Coach and Owner; report to sponsor	Track effort of sustaining efforts	5S Audit Checklist	

5S Economic Benefit Report

5S Event Area:	
Date of 5S Workshop:	Report Date:
Area Owner:	Sponsor:
Team Members:	

Attach "before and after" photos

Space Savings

Measure	Pre 5S	Post 5S	Percent Change
Square footage of floor space used			
Linear feet of shelf space used			
Other			

Inventory/Equipment Savings

Measure	Summary of Savings (attach additional information as needed)
Inventory returned to Central Supplies (one time cost savings)	
Estimated inventory cost savings (annual)	
Surplus equipment	
Other	

Labor Savings

Measure	Summary of Savings
Estimated labor savings	
Estimated travel distance saved	

Other Outcomes