

**Canadian Mental Health Association- Haliburton, Kawartha, Pine  
Ridge**

**Maximizing Social Enterprise Opportunities**

Project Status: March 31, 2017



# Problem vs Aim: Two sides of the same coin...



## Problem Statement

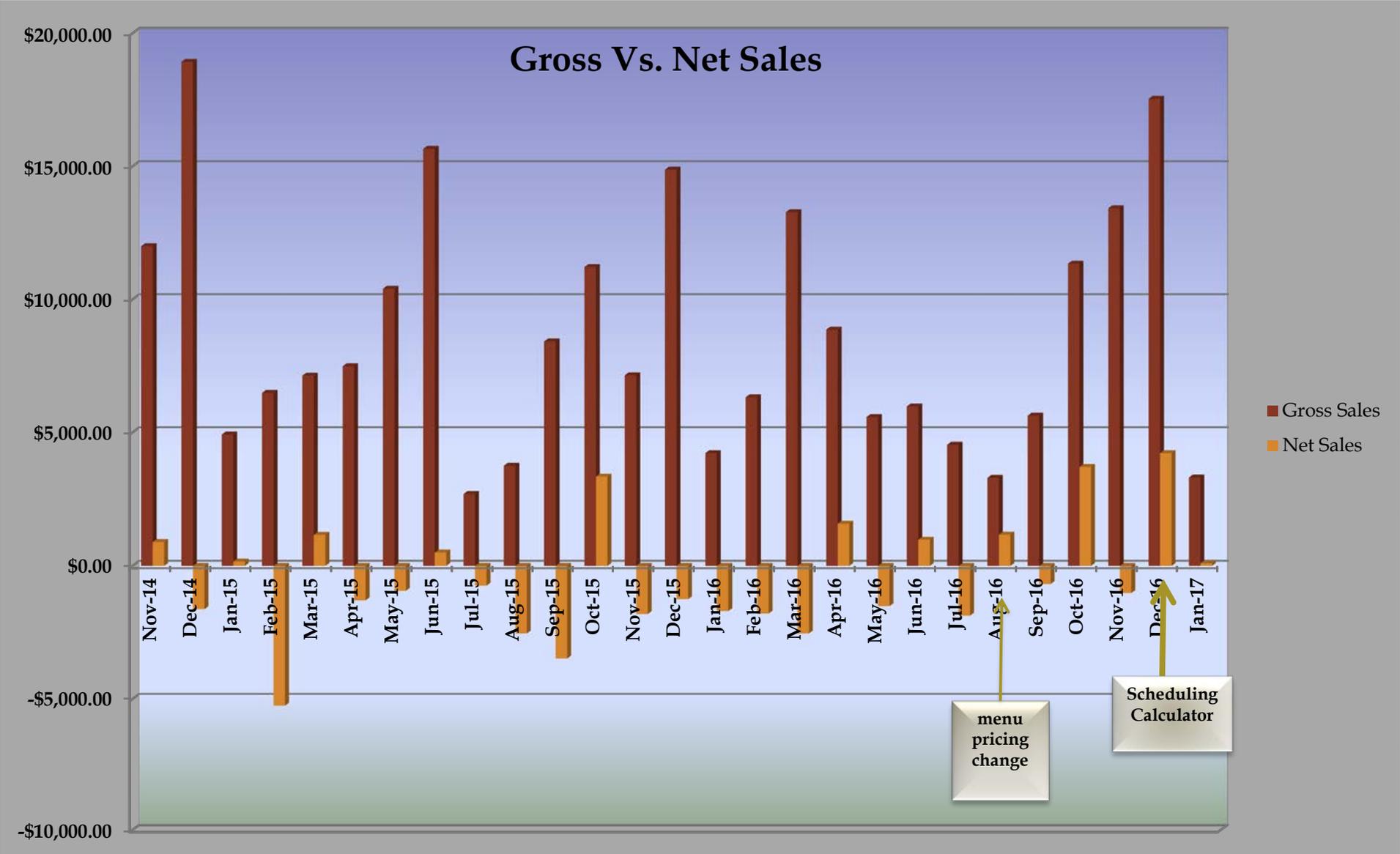
Catering Plus is a social enterprise which is operating in a deficit, therefore, putting employment of clients at risk.



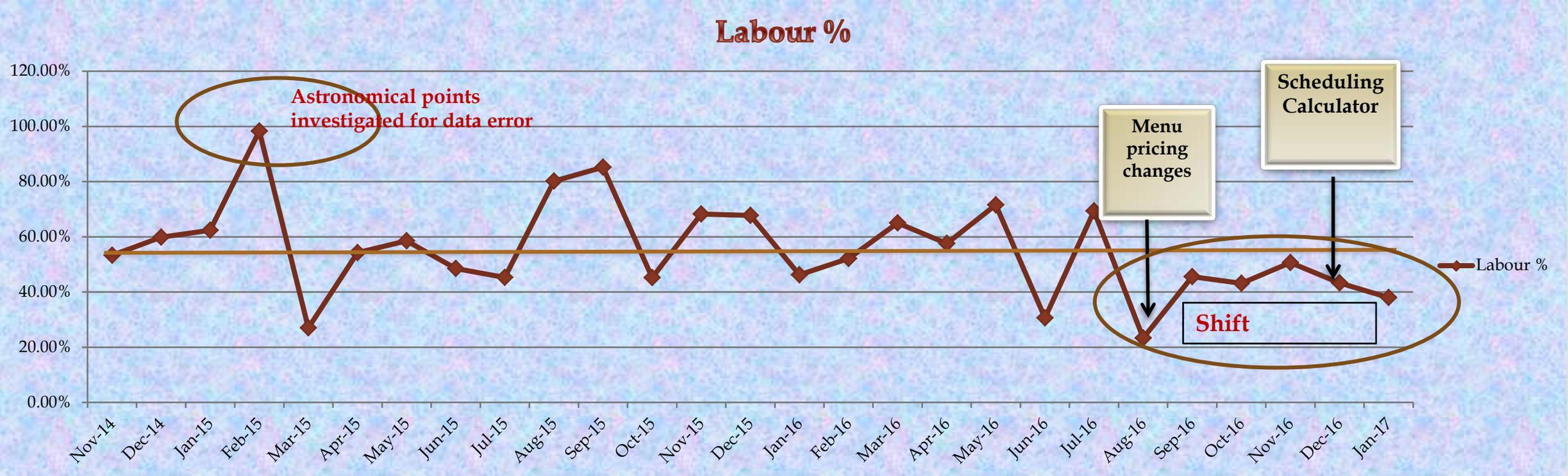
## Aim Statement

- Big Aim: Provide as many meaningful employment opportunities as possible to Caterers (ie clients).
- Project Aim: By March 31, 2018 Catering Plus will be operating as a sustainable business. Financial statements and charting will be used to measure a balanced or surplus budget by reducing catering costs from 116% to 90%. Employment opportunities will be maximized in a predictable way.

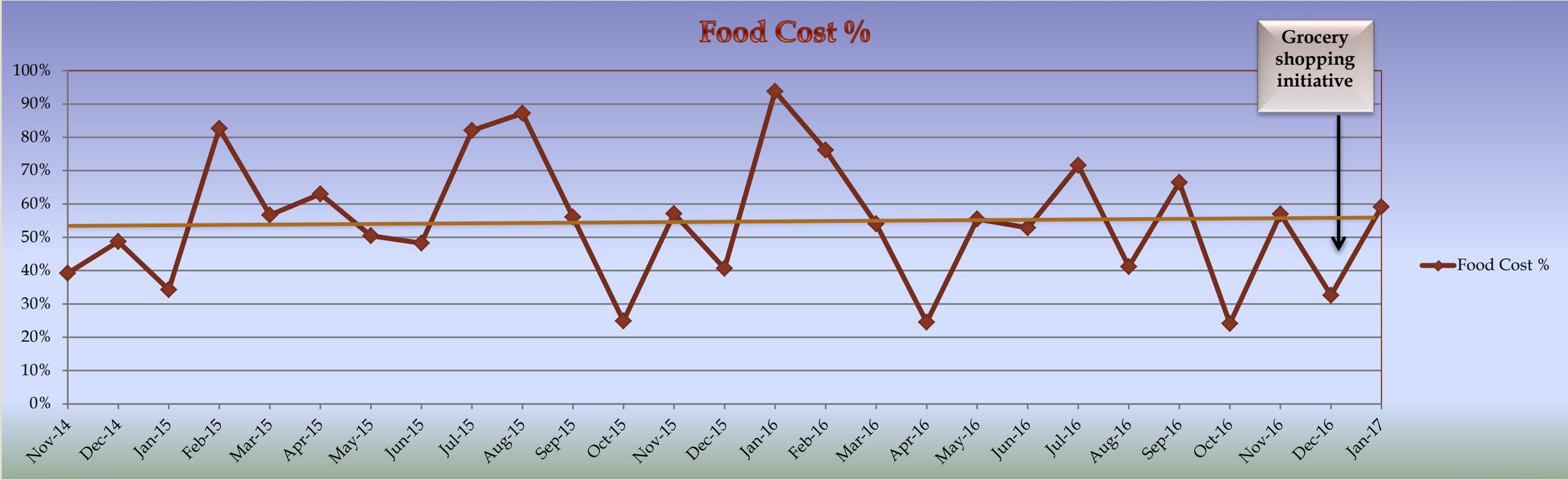
# Charts for Outcome & Balancing Measures



# Run Charts for Outcome & Balancing Measures



# Run Charts for Outcome & Balancing Measures



# January 10 & 11 Team Sessions



## Included

- ❧ Team Members (3 Caterers & Chef Ben )
- ❧ Process Owner (Small Business Assistant)
- ❧ Team Lead (Program Manager)
- ❧ Improvement Advisor (Linda)
- ❧ Data Coach via teleconference (Nicole)
- ❧ Executive Sponsors (2 Agency Directors) updated afterwards

# January 10<sup>th</sup>, 2017 Session

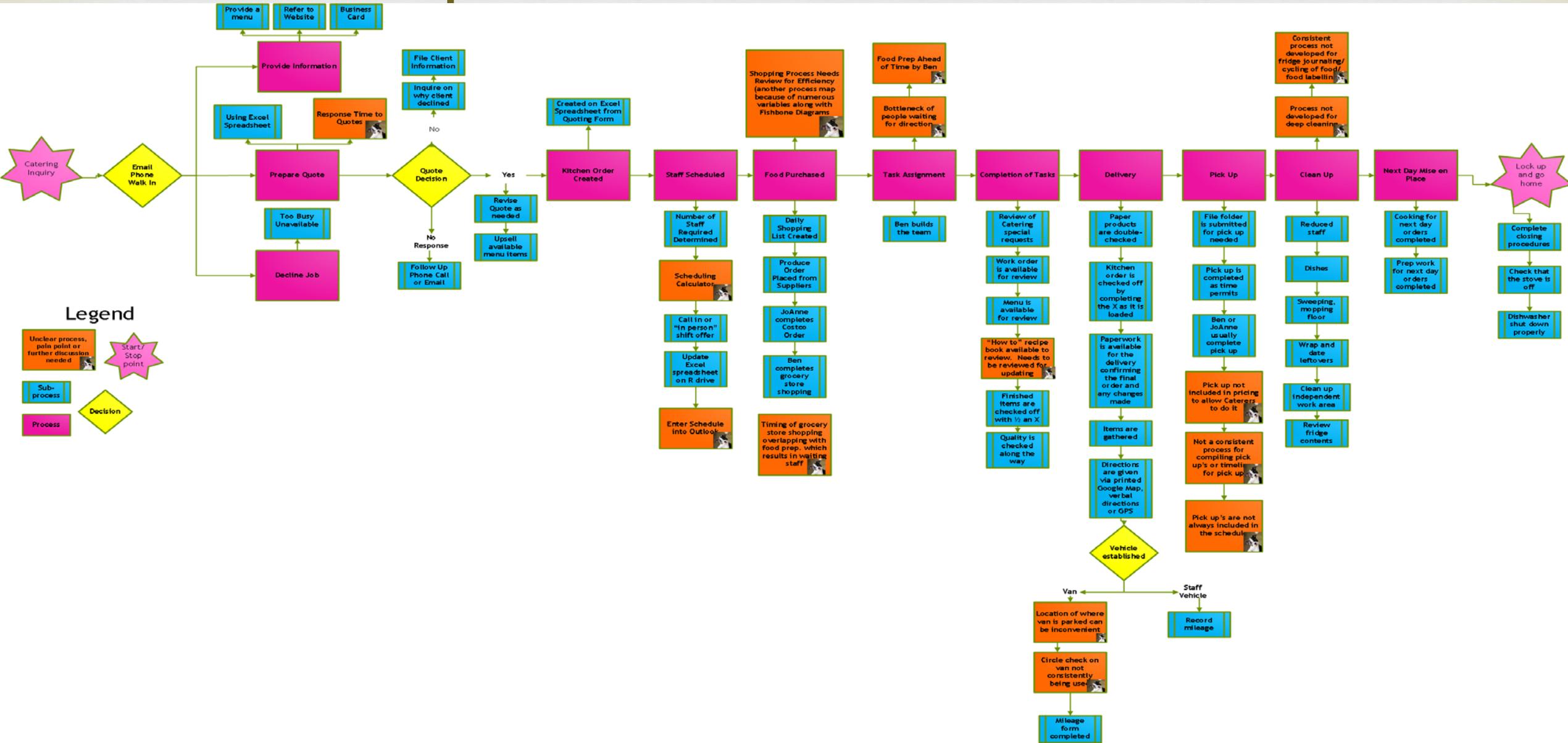


- ❧ Introduction and information about E-QIP project
- ❧ Review of Project Charter
- ❧ Explanation of budgets at Catering Plus-funded and not funded areas
- ❧ Review of Catering Plus Staff Satisfaction Survey results and brainstormed communication plan
- ❧ Completed a Process Map



# Root Cause Tools Used

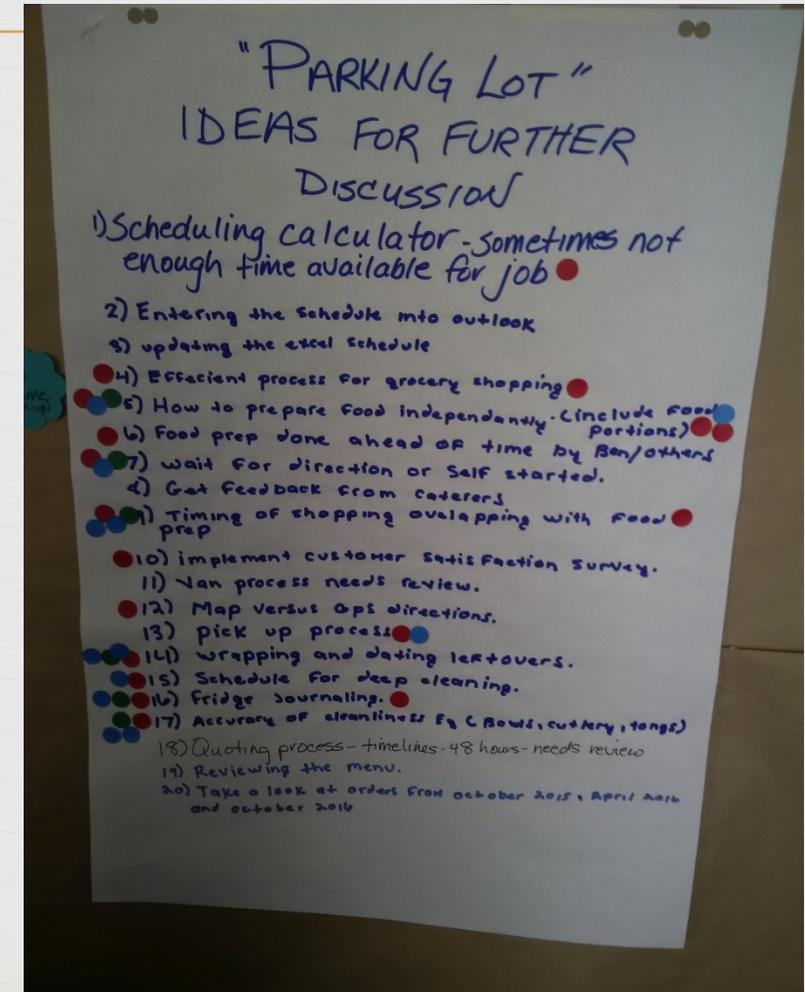
## Process Map



# Parking Lot from Process Map



- ✧ Didn't want to lose any ideas or "pain points" so they were recorded on orange Post-it's on the Process Map and transcribed to chart paper
- ✧ We did a "dotmocracy" to rate importance level



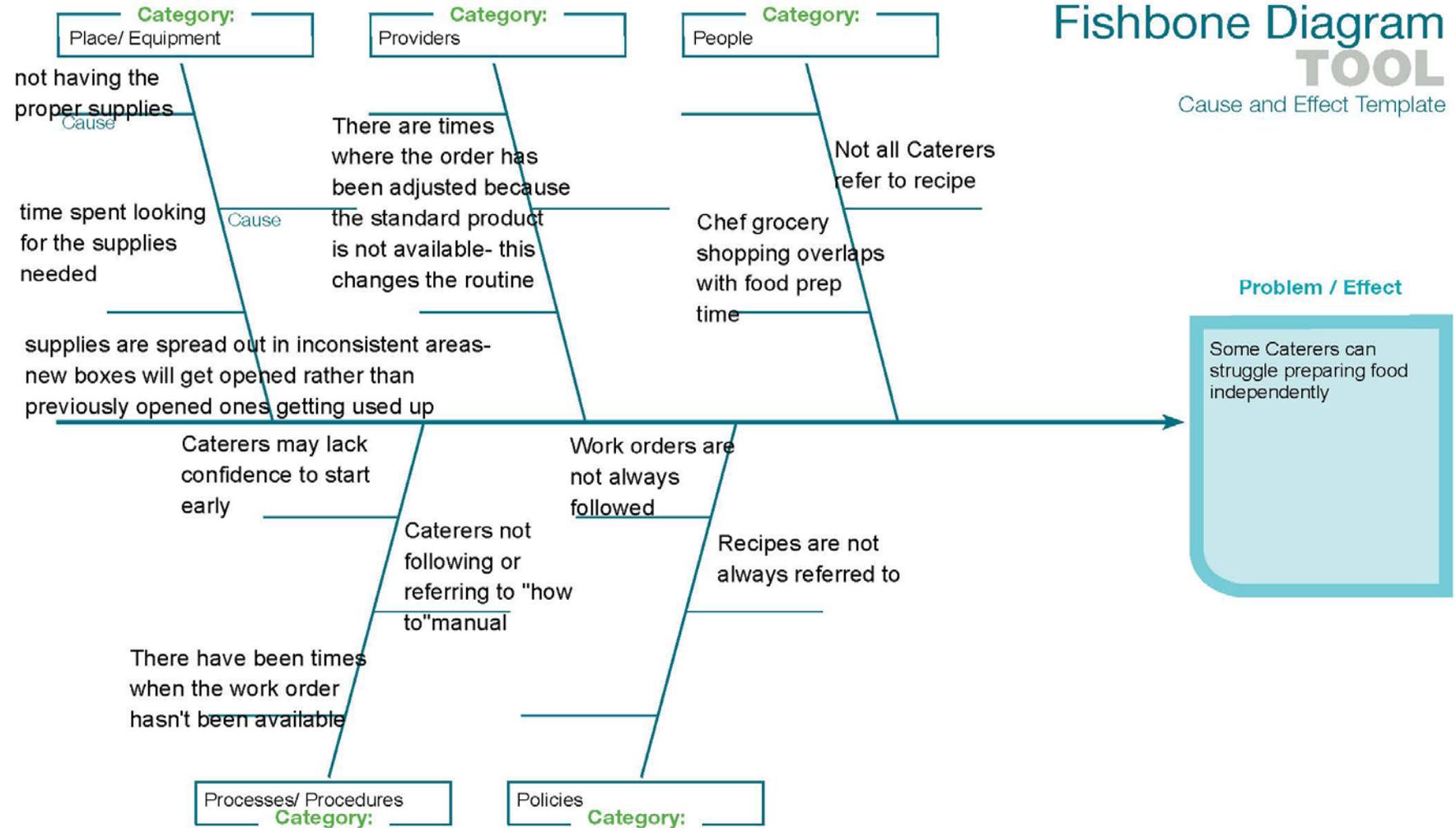
# January 11, 2017 Session



- ❧ Reviewed importance of Data and measurement of change
- ❧ Reviewed Catering Plus data
- ❧ Reviewed change initiatives that have already been started and the data charts to go with it
- ❧ Introduced Balancing and Process Measures
- ❧ Introduced Fishbone Diagram's and 5 Why's
- ❧ Completed Fishbone Diagram using information from Process Map exercise
- ❧ Completed 5 Why's using Root Causes identified in Fishbone Diagram
- ❧ Introduced Change Ideas

# Root Cause Tools Used Fishbone Diagram

## Fishbone Diagram TOOL Cause and Effect Template



# Root Causes: Labour Concerns



- ❧ Sometimes caterers lack proper supplies to do their job and can spend a lot of time looking for them
- ❧ Supplies are spread out in inconsistent areas
- ❧ Routines get changed because standard products aren't available when people need them
- ❧ Grocery shopping overlaps with prep time
- ❧ Not all Caterers refer to recipes/ manual when they need to- they ask instead
- ❧ Some Caterers lack the confidence to self start or prepare food independently
- ❧ Sometimes work orders are unavailable
- ❧ Worker orders aren't always followed

## Top Items We Decided On For 5 Why's:



1. How to Prepare Food Independently- People can struggle
2. Cleanliness is not always up to standard in some areas- sometimes there is duplication of work or work is incomplete in this area
3. There is an inefficient process for cycling food in the fridge
4. We are taking too long to prepare and follow up on quotes

# Root Cause Tools Used 5 Why's

## The 5 Why's

Adjustment to Orders- When Standard Products are Not Available it Changes the Routine Which Slows the Process Down e.g. An example is a time where the standard bread that we use was not available for the order

1. The bread had not been pre-ordered
2.
  - a. Once the bakery was not open to pre-order because of the holidays
  - b. There is a lack of documentation for what needs to be pre-ordered or recording what we are low on
3.
  - a. We only source from 1 vendor- **Root Cause**
  - b. The documentation system that is in place was not consistently followed- **Root Cause**

### Ideas:

- Continue to source other vendors who carry the quality bread needed at an affordable price
- Create a system for pre-ordering and for shopping items needed. Reinforce consistent use of the system

# Root Cause Tools Used 5 Why's

## The 5 Why's

### The Confidence of Caterers to Start and Complete Tasks Resulting in Inefficient Completion of Tasks

1. Some wait for direction before beginning their work for the day
2.
  - a. They are unsure of what to do
  - b. They are not finding the information themselves e.g. looking up the recipes or referencing the menu
3.
  - a. They are unsure of what products to use
  - b. They find it easier to ask someone else for the information rather than looking it up for themselves
4. a. They are unsure of what products are still good
5. a. There are no dates or labels on many of the products- **Root Cause**

#### Ideas:

- Rather than answering questions, reinforce system of checking available resources and reminding of expectations for self starting
- Gathering feedback from Caterers on the recipes ("How To" sheets) to see if they find them user friendly or if they need updating or changing in some way
- Create consistent system and communication for labeling food and process for expired food (including "fridge journaling)

# Root Cause Tools Used 5 Why's

## The 5 Why's

### Shopping Overlapping with Prep Time Causing Late Starts and Inefficient Use of Staff

1. Shopping is done the morning of an event
2.
  - a. Sometimes the morning is a slower time to do this
  - b. Sometimes the full grocery shopping trip is not completed the day before
3. Sometimes new orders come in throughout the day
4. There is not a process for combining the shopping needs of past orders and new orders that have come in- **Root Cause**
5. Frequent shopping trips were an attempt to reduce food waste by not buying in bulk and having perishables go bad

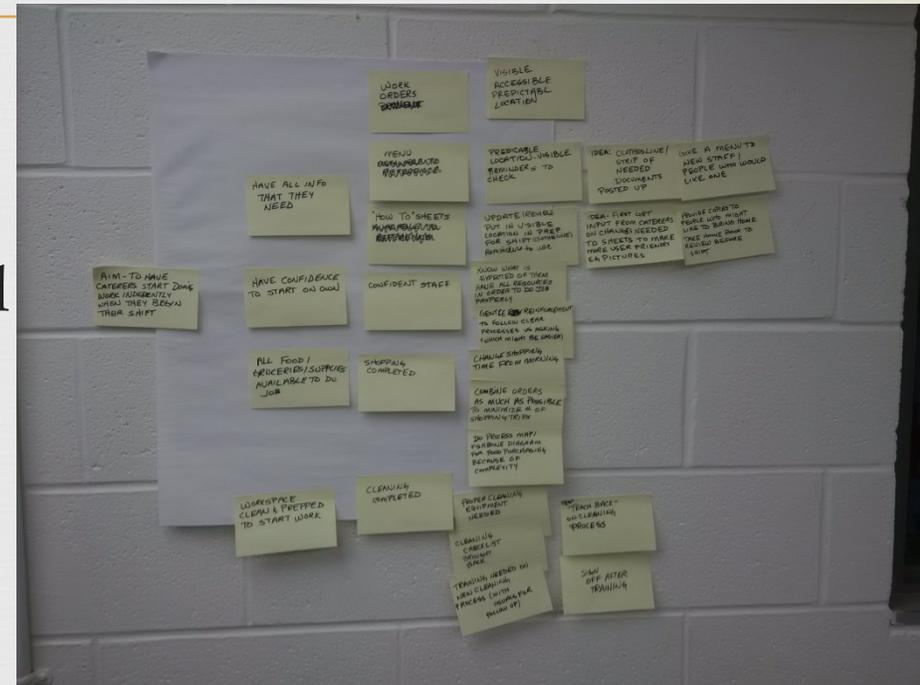
#### Ideas:

- Schedule shopping for a strategic time of day that allows for new orders that have come in and does not overlap with the start time of the Caterers
- Allow for needs of last minute orders (inevitable)
  - By only having to do a quick trip because the bulk of the rest of the shopping was already completed
  - By looking for efficiencies in bulk buying common items that are frequently used
- Process Map and Fishbone diagrams for Food Purchasing because of so many variables present

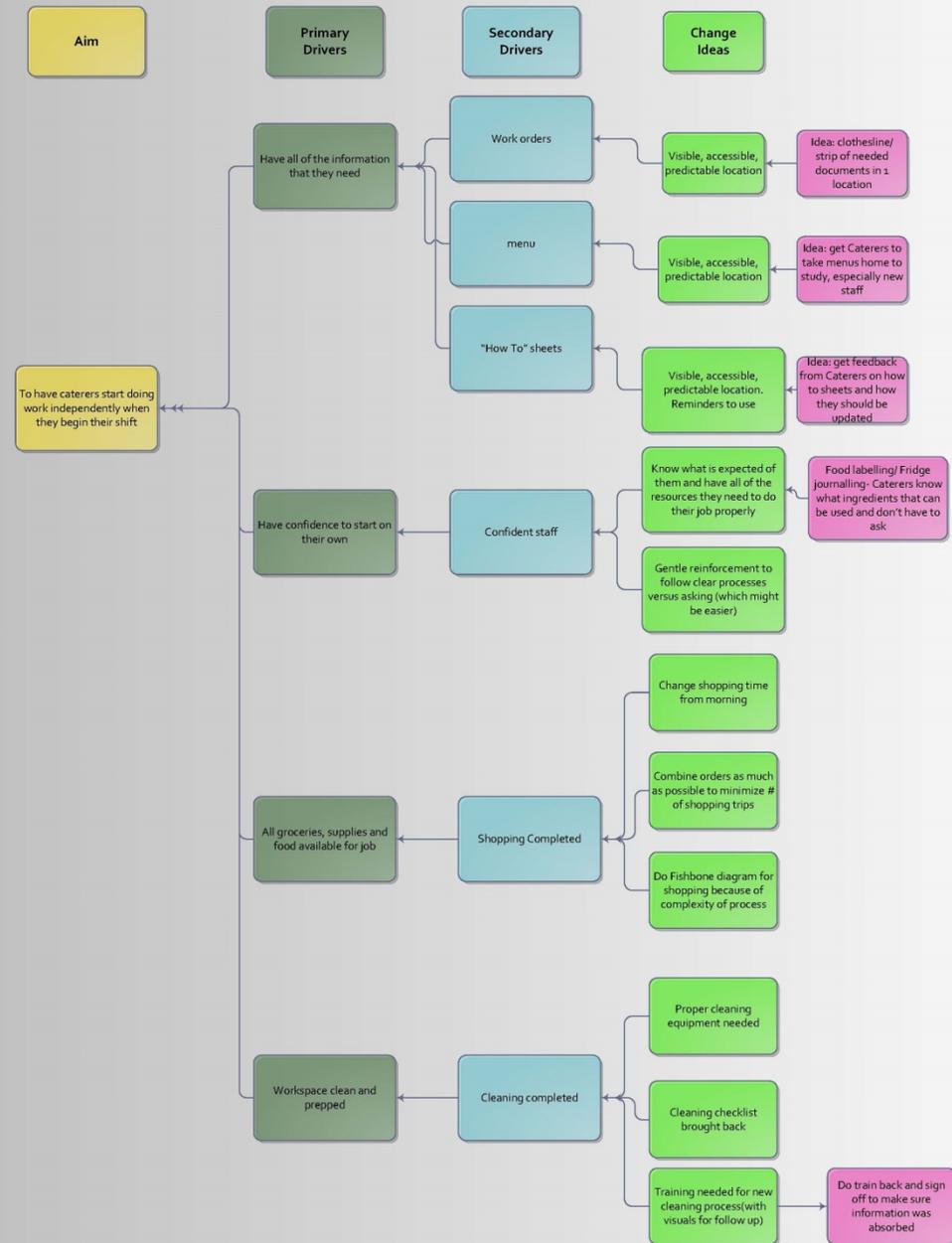
# February 6, 2017 Session



- ☞ Reviewed current data
- ☞ Recap of Toronto training
  - ☞ Reviewed Driver Diagrams and Completed
  - ☞ Change Ideas- reviewed
  - ☞ PDSA cycles- reviewed
  - ☞ Run charts- reviewed
- ☞ Change ideas
  - ☞ Prioritized where we start
  - ☞ Complete PDSA worksheets including measurement of change ideas



# Generation of Change Ideas: Driver Diagram



# March 6, 2017 Session

## Review of data



- ❧ Labour Cost percentage Run Chart
- ❧ Food Cost percentage Run Chart
- ❧ Net Sales Chart

## Change ideas

### Updates on PLAN

- ❧ Feedback from Caterers on “How To” sheets
- ❧ Food labelling/ Fridge journaling- Ben

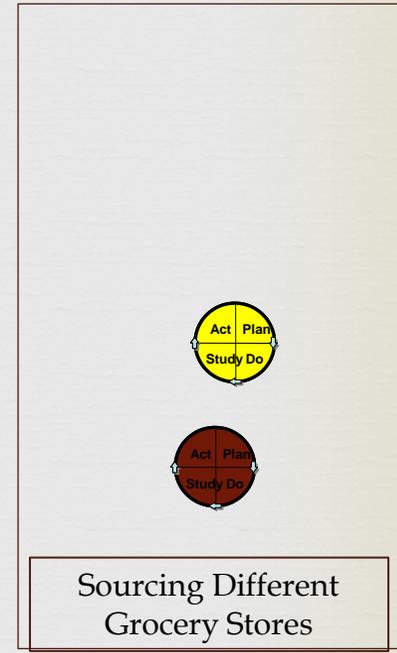
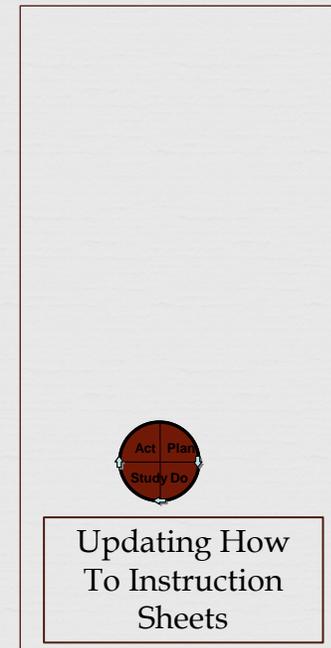
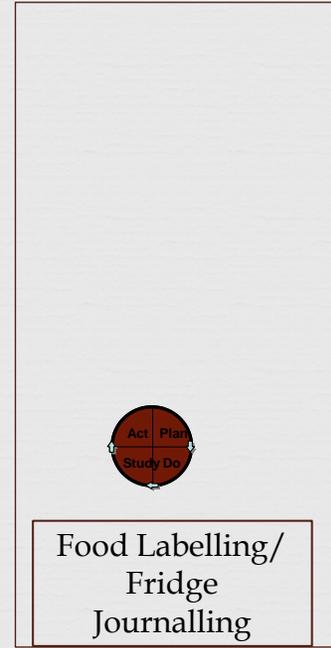
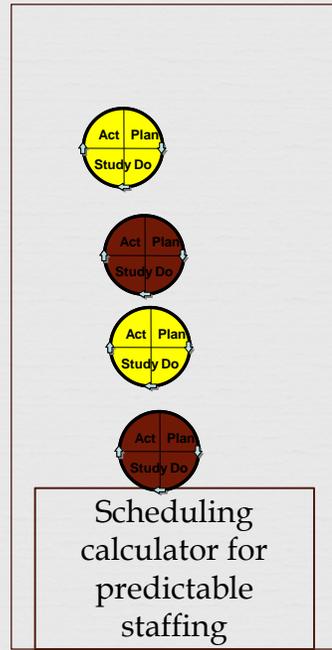
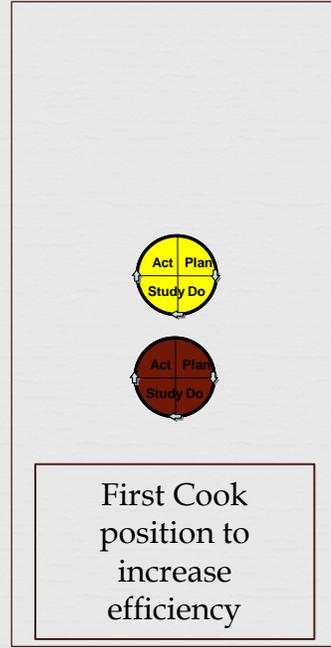
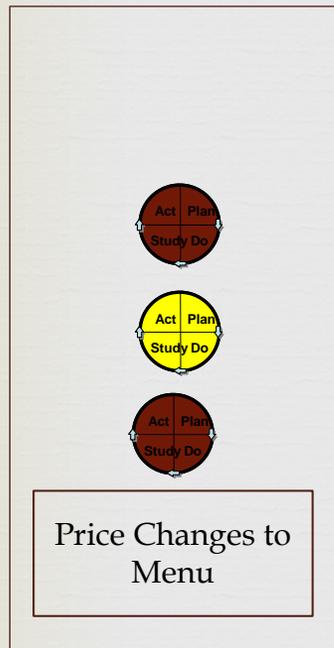
### Updates on DO

- ❧ First Cook

### Updates on STUDY

- ❧ Sourcing food supplies at different stores (Costco, Freshco, Farmboy, Skor)- **evaluate data, Adapt, Adopt, or Discard**
- ❧ Menu review- **evaluate data, Adapt, Adopt, or Discard**
- ❧ Scheduling calculator- **evaluate data, Adapt, Adopt, or Discard**

# PDSA Status: Developing/Testing Change Ideas




 Developmental    
 
 Testing    
 
 Implementation

**STATUS**

	Develop	Test	Implement	Total # Cycles
Summary	8	5		13

# Run Charts for Process Measures

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In development. Ideas for process measurement so far:

Increased independence and knowledge of Caterers

- ❧ Number of Caterers using updated How To Sheets (using a checklist in the book)
- ❧ Number of Caterers and staff completing fridge journals and food labels (resulting in Caterers knowing what they can and cannot use)

Sustainable and predictable food costs

- ❧ Measuring number of grocery stores used (which ones)

Sustainable and predictable labour costs

- ❧ Percentage of times in scheduling that the labour calculator is used

# Lessons Learned

## Challenges

- ❧ Connecting how the concepts and tools relate and applying them to the project in a meaningful way
- ❧ Taking a day's training and then being proficient leading the concepts and tools with others
- ❧ Finding the time to meet with others in the project, to keep everyone involved, complete the paperwork required and still have time to do the work of change
- ❧ The cost of wages to bring in necessary team members

# Lessons Learned

## Aha's"

- ⌘ The need to take the time to measure data in order to see if change is working
- ⌘ The tools (5 Why's, Fishbone diagram) to help get to the root causes of issues and the lack of 1 "silver bullet" to solve an identified problem.
- ⌘ The Process Map as a good visual to find inefficiencies and pain points
- ⌘ The people side of change

## Factors Enabling Project Progress and Pace

- ⌘ Time available to do data analysis and paperwork associated with the project
- ⌘ Availability of other members of the team to meet and work on it
- ⌘ Time available by team members to do the change work identified

# Lessons Learned

## What would you do differently next time?

- ❧ If there had been more time, it may have been easier to learn fewer concepts and tools at one time, get a chance to practice and use them and then build on the knowledge at the next session.
- ❧ The E-QIP team did a great job of providing us with amazing tools, information and training but it was hard to absorb and put it into practice in such a short amount of time with a full time workload while meeting the documentation demands of the project. I feel like I have a solid start though.

## Impact on your organization beyond the project and project team:

- ❧ There is a training session being led by our Improvement Advisor
- ❧ I'd be happy to be a mentor to others and share our information
- ❧ Catering Plus staff frequently refer to concepts they have learned from the project and have a greater understanding of the big picture

# Outcome and Sustainability Plan

- Implementation of the labour calculator has resulted in sustaining a financial surplus.
- Ongoing budget analysis by utilizing the labour calculator has increased sustainability of employment and increased further opportunities.
- The labour calculator has provided a guideline to schedule the appropriate amount of catering hours required for each catering job, promoting a more efficient scheduling process.
- The First Cook position has been implemented successfully, mentoring the Catering team and providing assistance to the Chef and Small Business Assistant.

# Outcome and Sustainability Plan

- The “How to Cook” manual is an effective way for Caterers to reference any menu item that need to be prepared. Promotes employee independence and increased productivity
- Implementation of food journaling assists in monitoring waste, more efficient grocery shopping with lower food costs
- Increased job satisfaction and job stability for employees
- Sustainable budget plans
- Standardized practises for staff to follow and reference
- Improved working conditions and staff retention