

IMPROVE YOUR WORKFLOW: Organizing Workspaces with the 5S System

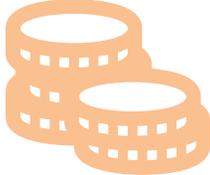
Purpose: This tool is adapted from the Lean Management System to help you *organize* your physical workspaces, with a column for taking notes.

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5S

Make it happen!

Notes

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<p>Sort</p> <p>Separate unnecessary items from the items you need to perform your work. Tag unneeded items to give away, dispose of or archive as appropriate.</p>	<ul style="list-style-type: none"> Have all staff think about how often all materials are used to help decide if an item should be easily accessible, stored or removed (place tags on items to be removed). <ul style="list-style-type: none"> Remove unused items from an area – outdated materials, repeated materials (50 pens?), old electronic and paper files, etc. Store items that are not used as regularly. Establish a ‘holding area’ for items that are difficult to decide about. Choose a deadline for others to review the items on hold and help decide whether to keep or discard. Clearing out unneeded items is important in both shared and individual spaces! 	
<p>Straighten</p> <p>“A place for everything and everything in its place”. It’s best if you organize so a quick visual scan can determine whether you have everything you need.</p>	<ul style="list-style-type: none"> Identify a specific place for all the materials needed for your work. Assign specific places and specific quantities. You can write the item name and quantity on small a piece of tape and tape it to the designated spot. Decide how things should be stored and keep using that system as you go forward! Ideally, you should be able to tell in a matter of seconds if something is missing, running low, or out of place. 	
<p>Sweep</p> <p>Clean and maintain materials and spaces regularly. It’s easy to see if something is out of place or needs to be dealt with!</p>	<ul style="list-style-type: none"> Identify the root causes of any mess and create processes to make sure your spaces get cleaned. Be proactive in preventing mess! <ul style="list-style-type: none"> Consider making cleaning and organizing a daily activity (say, at least 5 minutes per day) so disarray and dirt don’t build up and become overwhelming. Consider having an office cleaning chart to share the responsibilities, and a visual aid to show how it should look. Do only one tidying activity on a workspace at any given time. 	
<p>Standardize</p> <p>Create clear standards for both organization and processes. Take the first 3 S’s and make guidelines for ‘how’ and ‘when’. Can be in charts, lists, etc.</p>	<p>Standardize how the staff organizes and cleans.</p> <ul style="list-style-type: none"> Define and document how it’s done and share it with the team! Create a process for maintaining the standards, with clearly defined roles and responsibilities. Make it easy for everyone to identify when something is out of place. <ul style="list-style-type: none"> Consider putting photos of how it should look in the area for a quick visual reminder See Improve Your Workflow: Define and Document Processes emPower Tool for more tips. 	
<p>Sustain</p> <p>Put into practice habits and review systems to maintain the established organization and standards. Essentially, continue the first 4 S’s over time. Commitment and staff buy-in are crucial!</p>	<p>The toughest “S” is to <i>Sustain</i> – don’t give up!</p> <ul style="list-style-type: none"> Establish and maintain responsibilities. Managers must be committed to follow through. <ul style="list-style-type: none"> Everyone needs to stick to the rules and make it a habit. Use the “Plan, Do Study, Act” system in Improve Your Workflow: Define and Document Processes emPower Tool. Have regular check-ins and thoughtful problem-solving for root causes. Have everyone participate in developing good habits and get buy-in. Build these responsibilities into staff training. See Create a Data Culture: Engage Staff emPower Tool. 	

Levels of Progress in the 5S System



5S Level	Sorting	Straightening	Sweeping	Standardizing	Sustaining
Level V Continuously Improve	Cleanliness issues are identified and mess-prevention systems are in place	Map created for each item in storage room. Map shows general location and layout of materials and can be easily accessed.	Potential problems are identified, and solutions are documented	Reliable standard processes are revised when opportunities for improvement are identified	Root causes of identified issues are dealt with. Improvements focus on preventing the issues.
Level IV Make it Reliable	Work area has documented housekeeping responsibilities and schedules, and they are regularly followed	Materials move from storage to use and right back to their storage place. Visual system is created to identify whether something is being used (like a photo of the storage space when fully stocked)	Areas are checked regularly, and work areas are restocked and organized as needed	Reliable, standard processes are followed by all staff	Sources and frequency of problems are noted. Root causes of problems are identified. Plans for improvement are developed.
Level III Make it Visual	Initial cleaning is complete. Unneeded items are given away or disposed of.	Needed items are identified, storage locations are properly labeled, and required quantities are determined	Visual guides are posted and work areas are marked with locations for files and materials	Visual cues team will use are documented	Staff routinely checks area to make sure the 5S agreements are maintained
Level II The Basics	Needed and unneeded items are identified. Unneeded items are removed from work area	Necessary items are stored and organized according to how frequently they are used.	Staff have decided on and documented the expectations and a system to review them regularly	Staff have documented agreements for needed items, organization, and work area standards	5S agreements are completed and communicated. 5S is incorporated into new staff orientation
Level I Beginning	Necessary and unnecessary items are mixed together throughout the work area	Needed items are located in various places throughout the work area (so, when you need new staples, you have to look in four places because you aren't sure where they are)	Important work items are missing	Standards for work area organization are not documented and/or not followed	Work area organization and supply checks are not done regularly, and there is no easy, visual way to check on 5S agreements

You can move up to the next level of goals when you cross off everything on the level you are working on!

It is easier to go step-by-step than to leap from one level to another.

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