

Save Your Sanity

Planning During a Healthcare Crisis

By Kathy Iberle

Key Points

- Caring for an elderly relative often requires keeping track of many, many tasks.
- A “Visual Planning Board” can help you stay on top of the tasks and their changing priorities.
- The focus provided by a Visual Planning Board will help you feel less overwhelmed.

The Storm Hits...

A healthcare crisis can hit without warning, leaving you both nursing the patient and mired in seemingly endless bureaucracy. When my elderly uncle suffered a stroke and could not return to his previous home, a long series of complications ensued, including assisted living, rehab, a nursing home, and Medicaid. This was further complicated by the shaky state of his finances and my unfamiliarity with them.

I started by writing a to-do list in a spiral-bound notebook dedicated to my uncle’s needs. Within two weeks, this method had failed miserably. A few tasks had proliferated into dozen of tasks with rapidly shifting priorities. Every stone I turned had half-a-dozen stones beneath it, often crawling with unpleasant life forms. Keeping track of what I should do next felt impossible. I turned to a method that I had been using in my Lean consulting business – the Visual Planning Board.

Visual Planning Board to the Rescue

First I wrote each task from my to-do list on a sticky note (*Figure 1*).

Then I laid out all the sticky notes on a large piece of cardboard. I drew one column for each week. Then I put each task into the column for the week in which that task needed to be finished. All the tasks that didn’t need to be finished in the first month went into a box called “Later”. (*Figure 2*)

Now I had a better picture of what needed to be done and by when. Each week, I could work on the tasks for that week. The job didn’t seem quite so overwhelming. However, this picture wasn’t entirely reliable because some tasks would take longer than a week. Those needed to be started earlier, but how much earlier?

To simplify the tracking, I looked over the first few weeks and found the tasks bigger than a week. I split each big task into a set of smaller tasks, a week long or less. For example, “Find a permanent home” was split into the likely steps for finding a home (*Figure 3*). The final task was placed in the week that it needed to finish, and the earlier ones were distributed over the weeks leading up to it. (I didn’t bother to split up the big tasks that were further out than four weeks, because they were likely to change before I got to them.)

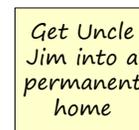


Figure 1

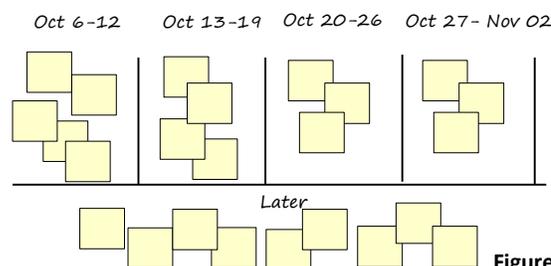


Figure 2

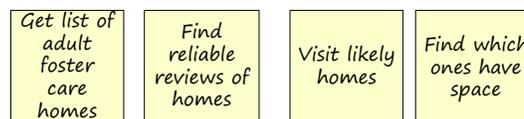


Figure 3

Now the sticky notes for the current week were a pretty good picture of what needed to be done this week. This helped me avoid starting more than I could realistically finish. I could also see where the plan was simply not feasible (indicated by a huge pile of sticky notes in a single week) and decide how to adjust it.

Avoid the Dead Ends

Splitting up the larger tasks often revealed that I didn't really understand one of the steps. When I investigated what I didn't know, that often changed (or eliminated!) an entire group of tasks.

For instance, what were the criteria for determining "likely" adult foster care homes? After some digging, I discovered that the process for Medicaid patients isn't the same as the process for private-pay patients. My uncle's Medicaid case manager explained the process, and I replaced the set of four sticky notes shown previously with the set shown in *Figure 4*. The exercise of writing out the smaller tasks saved me from going down a dead end more than once.



Figure 4

Keeping Up with the Storm

As I completed tasks, I checked them off with a green felt marker. When I finished a task, I tried to start another one in the current week, one without a green checkmark. The huge number of things to do didn't feel as overwhelming because now I wasn't looking at all of them all of the time, but rather only at the tasks which were the most urgent.

However, I soon found that I couldn't tell the difference between tasks which hadn't been started and tasks which were waiting for a response from someone else – his bank, doctor, insurance company, etc. This annoyed me because I couldn't tell how much I still had to do. I made a second column on the board for tasks which had been started and were now "Waiting" for a response. (*Figure 5*)

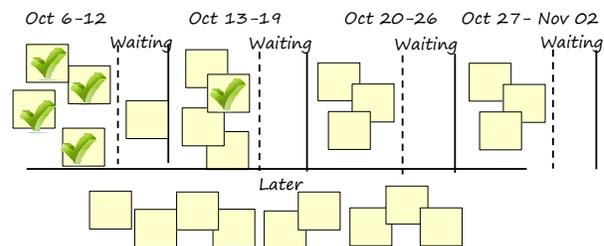


Figure 5

The Winds of Change

Every Sunday, I sat on the floor in front of my board and planned the next week. I moved the unfinished tasks from last week into the new week. I looked over the tasks not yet started to see if they were still sensible. I checked three weeks ahead to see if any large task needed to be broken up. When I ran out of room to put another week on the board, I got a second board. When I reached the end of the second board, I took everything off the first board and re-used it.

Every couple of weeks, something major happened which radically changed the plan. For instance, a second stroke threw the arrangements for assisted living out the window, since he'd now need a nursing home. Each time something big came along, I sat in front of the board, pulled off all the now-irrelevant sticky notes, and wrote new ones for the new tasks.

Eventually, the contents of my board shifted from nursing homes to funeral planning, and then to closing up the estate. Throughout the process, using the Visual Board allowed me to spend less time struggling to keep track of the flood of tasks, and more time visiting with my uncle in the last months of his life.

Some Practical Tips

Your sticky notes will be moved around a lot, so super-sticky rather than "regular" will work better. Neatly writing on the sticky note with a felt marker is important – you want to be able to read them easily! A Visual Planning Board can be created on the wall, or on large sheets of paper. I prefer 3'x4' trifold foam display board. The sticky notes stay in place well, the board can be moved around the house, and it can be folded up to hide the sticky notes when you need an evening off from thinking about it.

Find more uses for Planning Boards at www.iberleconsulting.com under Insights and Thoughts.

Dedicated to the memory of my Uncle Jim, who passed away November 30, 2013.