

LEAN TRAY TOOLKIT

Centre for
Sustainable
Delivery



NHS
SCOTLAND



OUR NETWORK

National Green Theatre Programme

The National Green Theatre Programme have developed this toolkit for distribution and use across NHS Scotland

Lean Tray Stewards

Identify Lean Tray Steward within each specialty, and a Champion in local boards to coordinate the work

CDU Contact

The programme has identified a key contact within each CDU that will support the work.

Engage Suppliers

Some trays will require supplier input for redesign process, such as consignment trays. Contact them early.

SharePoint

All resources can be found on our SharePoint site. Including data and local success stories



DIGITAL LEANING PROCESS

1



Identify Tray

Tray identification can be based on:

- High volume/ high impact trays
- Large tray sets
- Procedure specific
- Generic Trays

2



Planning

You will need:

- Instrument List
- Tray Photograph Template Workbook is provided for your project planning.

EXCEL
TEMPLATE

FORM
TEMPLATE

3



Data Collection

Distribute your form or excel template. All consultants who use the tray set should be consulted.

Ask your colleagues to rank instrument utilisation as:
Always Used / Often used / Rarely Used / Never Use

4



Implement

Identify instruments to:

- Keep / Remove
- Add supplementaries
- Consider conversion / complex tray

Design a lean tray in consultation with your CDU point of contact
Capture tray photograph.

5



Feedback

Gather feedback from Lean Tray Champion should monitor for any issues and adjust as necessary.
Template available below

FORM
TEMPLATE



OPTIONAL

Generic Trays

Generic trays are often used for many procedures within the specialty or shared by specialties

Additional Data

Gathering additional data may benefit the lean process by auditing instrument use in real time, capturing a range of procedures and surgeons

Template

A template form is linked allowing teams to Audit and Re-audit instrument use.

FORM
TEMPLATE

Distribution

Generate a QR code for your audit form and display in your theatres. Ask the team to complete the form at every tray use

Template

Combine the Audit data with your Digital Leaning Process to design your Leaned Tray



MEASUREMENT

What to measure?

Record all trays leaned, including the overall reduction in trays, size, instruments and supplementaries

Local

Lean Tray Champions should record their teams progress and feedback to their Specialty Steward

National

Stewards are invited to update our national spreadsheet outlining progress across specialties

[LINK](#)

SDG

Your teams progress with the Lean Trays Project will be discussed as part of the SDG

Share Your Trays

Share examples of good practice or successful leaned trays through the SDG or [SharePoint](#)