

5S Audit Form

NAME: _____ DATE: _____ TEAM: _____

For each statement, check the score that best represents the 5S level for each item in each category.

Total score for each category and then add category totals.

<u>SORT</u> Sort out necessary & unnecessary items. The items deemed unnecessary and not being used should be removed from the area (incl. General area, workstations, personal storage areas, desk drawers, filing cabinets, PC electronic files, safe)	Unacceptable <i>No evidence shown</i>	Poor <i>Only evident here and there</i>	Good <i>Applied and evident in most areas</i>	Excellent <i>Thoroughly evident and applied to all areas</i>	World Class <i>Continuously looking for ways to make even more improvements</i>
1. Items/supplies on surfaces have been sorted, separating needed (used frequently) from unneeded (used infrequently or not at all).	1	2	3	4*	5
Details:					
2. Items/supplies in bookcases or on shelves have been sorted, separating needed from unneeded (available electronically or not needed at location).	1	2	3*	4	5
Details:					
3. Items in cupboards or drawers, including desk and file drawers, have been sorted, separating needed from unneeded (available electronically or not needed at location).	1	2	3*	4	5
Details:					
4. Items on floors have been sorted, separating needed from unneeded eliminating floor piles and all cords are safely contained.	1	2	3*	4	5
Details:					
5. Needed items (in cupboards, drawers, bookshelves, on surfaces, or floors) have been placed at the closest location to where they are used the most to minimize the waste of motion.	1	2	3*	4	5
Details:					
6. Unneeded items have been removed from the work area.	1	2	3	4*	5
Details:					
7. Work agreements for the above are documented and all staff know where to find the agreements.	1	2	3	4*	5
Details:					
Total Score					24

<u>SET IN ORDER</u> A place for everything and everything in its place so it should be easy to find	Unacceptable	Poor	Good	Excellent	World Class
8. Locations of needed items are labeled and items are in correct locations.	1	2	3	4*	5
Details:					
9. Required quantities for needed items are determined (par levels), including items in desk drawers and in bookshelves.	1	2	3	4*	5
Details:					
10. Locations for movable items are labeled, and items are placed in correct locations (white board/laminated card/label on wall can be used).	1	2	3	4*	5
Details:					
11. Visual controls and indicators are established including: Posted map of area, including individual room maps.	1	2	3*	4	5
Details:					
12. There are Kanbans for re-order (if used by group agreement).	1	2	3	4*	5
Details:					
13. There is Labeling indicating contents of drawers and cupboards (a new person should be able to locate without assistance).	1	2	3	4*	5
Details:					
Total Score					23

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SHINE Keep work area clean and ready to use. Inspect regularly to ensure sort and set in order are maintained.	Unacceptable	Poor	Good	Excellent	World Class
14. Work areas and equipment are stocked and organized on a consistent basis according to 5S agreements and schedules.	1	2	3	4*	5
Details:					
15. Members of the work group follow 5S agreements on a daily basis.	1	2	3*	4	5
Details:					
16. Sources and frequency of 5S problems are documented as part of routine work by all staff.	1	2	3*	4	5
Details:					
17. Surfaces are cleaned and clear of dust and debris.	1	2	3*	4	5
Details:					
18. Checklists are utilized to identify ongoing Shine duties and the status of these are up-to-date.	1	2	3*	4	5
Details:					
Total Score					16

STANDARDIZE Maintain the first three S's and have an awareness of improving neatness.	Unacceptable	Poor	Good	Excellent	World Class
19. There is a 5S agreement in place and all employees know where it is located.	1	2	3*	4	5
Details:					
20. Leadership can explain why 5S is important.	1	2	3*	4	5
Details:					
21. All staff can explain the importance of 5S.	1	2	3*	4	5
Details:					
22. There is a standard process for training and orienting new staff to the 5S system.	1	2	3*	4	5
Details:					
23. There is a process in place to ensure unnecessary items do not "creep" back into the work area.	1	2	3*	4	5
Details:					
Total Score					15

SUSTAIN The 5S Discipline is embedded so that it becomes a way of life. 5S is no longer an event but routine.	Unacceptable	Poor	Good	Excellent	World Class
24. 5S plans and action updates are clearly displayed and current.	1	2	3*	4	5
Details:					
25. Success stories are displayed and confirmed for improvement.	1	2	3*	4	5
Details:					
26. Staff 5S roles are clearly identified.	1	2	3*	4	5
Details:					
27. Department audits and subsequent improvement plans are displayed and current.	1*	2	3	4	5
Details:					
28. Are work instructions and procedures available in the workplace regularly reviewed/kept up to date?	1*	2	3	4	5
Details:					
29. Are display boards, activity charts, notice boards, etc. up to date and regularly checked?	1*	2	3	4	5
Details:					
Total Score					12

Total the category scores to find your 5S level:

Level 1: 1-26

Level 4: 79 - 104

Level 2: 27-52

Level 5: 105 - 130

Level 3: 53 - 78

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Lean Culture

How Sustainable is your 5S Work Environment?

The following elements are based on research into the primary influencers of where an individual or group can and will sustain a new way of doing things. Assess the current state for your team on these items.

Element	In terms of 5S...	Yes	No
Credibility	Can most staff describe the benefits clearly, or do they at least trust that benefits have been achieved elsewhere and are possible here?	*	
Benefits	Have most staff experienced a reduction in waste and extra effort, with things running more smoothly, because of your 5S efforts?	*	
Adaptability	Are you confident about overcoming any internal pressures to sustain a 5S'd environment and continue improving?	*	
	Can your 5S work be sustained without over-reliance on a particular individual, group, technology or money?	*	
Staff Training	Do you have a process to identify gaps in knowledge, train to fill these gaps, and continue skill development in your staff? .	*	
Systems	Does your infrastructure (e.g., policies, communications, job descriptions, facilities, equipment) support being a 5S'd workplace?	*	
Attitudes	Do most staff think being 5S'd is a better way of doing things that they want to preserve for the future?	*	
Leadership	Does your staff see the department/section leadership (administrative and clinical) personally involved, demonstrating 5S in their spaces, and helping the team with sustainability?	*	
Monitoring	Do you have an effective process to monitor progress, act on needs and communicate results?	*	
Culture	Does your team have a "can do" culture and a history of successful change/sustainability?	*	

The more items with a No answer, the more vulnerable your team is to backsliding on your 5S progress. Identify strategies to address the weak points in the coming months.

Action Plan

Description	Action summary	Responsibility
We are currently working with in a clinic setting and with their schedule having finally been able to get all the staff involved in a 5S project.	All the staff were involved with pulling out all the supplies and either getting rid of them relocating it, or grouping it with the like supplies in that room.	All staff will be responsible to maintain these changes.
We selected their Procedure room, that all the staff use, and needed some special attention.	Staff were at first hesitant to move anything or dig and start sorting, but then really started to enjoy it when they started finding all those 'Lost' items!	Supplies were placed in either 2 bins or in a bin that will have a Kanban...
Staff were very receptive and thankful for helping them with this... It seems like they always say that this was something that they have wanted to do, but Never take the time to do it!!		
	Next week when all the items are entered into our database I will print Labels and make the Kanbans that they will use for the reordering of supplies.	
	Plant operations will also be contacted	

