LEANOhio

BOOT CAMP

★★★★★

Day 1

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TRANSFORMING
the PUBLIC SECTOR
Simpler. Faster. Better. Less Costly.

WELCOME AND INTRODUCTIONS

Introduce yourself

- Name
- Where you work
- What you do
- Any experience with Lean/Six Sigma/Quality Improvement
- First or most interesting job

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GROUND RULES

As with any group session, it is a good idea to establish, state, and agree to the ground rules we will adhere to in the session. Here are the ground rules we have established:

- Everyone Participates
- Engage in Open and Honest Dialogue
- Respect the Opinions of Others
- Work to Build Consensus
- Suspend Judgment/Blameless Environment
- Leave Rank at the Door

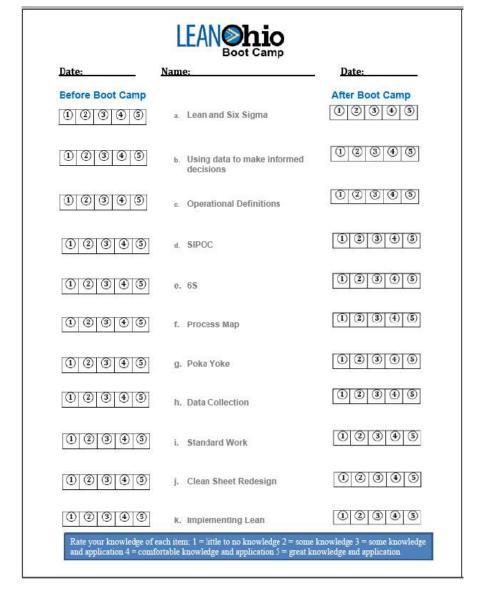Can you think of any others?

HOUSEKEEPING RULES

Help Us to be Mindful

As with any group session, it is a good idea to establish, state, and agree to the ground rules we will adhere to in the session. Here are the ground rules we have established:

- Silence Your Cell Phones
- Interruptions to a Minimum
- Be on Time
- Stretch
- Always Snack Time!
- Dress Code
- Schedule/Breaks/Lunch

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SELF-ASSESSMENT

LEANOhio

SIMPLER • FASTER • BETTER • LESS COSTLY

VIDEO:
Lean Ohio
Overview

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90's

Quality Services through Partnership (QsTP)

OCSEA AFSCME

Team UP ODOT

2000's

Malcolm Baldrige National Quality Award

DAS Office of Accountability & Results begins facilitating Kaizen events

改 善

2011 - 2013

DAS Office of Accountability & Results becomes LeanOhio

Cintas Corporation invited to brief cabinet on LSS concepts

CINTAS
THE SERVICE PROFESSIONALS

120 state employees trained in LSS

Average reduction in overall process steps is 52%

52%

2014 - 2015

LeanLocal launched with $4.6 million available to local entities and learning and improvement projects

Local Government Efficiency Program

LeanOhio launches Boot Camp training and introduces the Camo Belt

LeanOhio becomes one of the 1st state govt to launch own Black Belt training

LeanOhio facilitates 50th Kaizen event

改善

2016 - 2017

Over 500 state employees trained in LSS

500

> 500,000 staff hours redirected to higher priority efforts that improve customer service

LeanOhio launches LLDP

LEANOhio LLDP Lean Leader Development Program

LeanOhio partners with OSU Center of Operational Excellence

THE OHIO STATE UNIVERSITY

Average reduction in overall process time is 67% and > 10,000 process steps eliminated

2018 - 2019

LeanOhio facilitates 88th Kaizen event

> 1000 state employees trained in LSS

> 10,376 days reduced in start-to-finish process time and more than 1 million redirected hours

LeanOhio provides online training opportunities

LeanOhio Joins the American Society for Quality (ASQ)

Q ASQ AMERICAN SOCIETY FOR QUALITY

Develops partnerships with Governor's Office initiatives

4 Day Boot Camp

DAY ONE Introduction, Overview and Basic Principles	**DAY TWO** Understand the Situation, Making the Invisible Visible
DAY THREE Analyze and Improve	**DAY FOUR** Implement and Monitor

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DAY ONE

Introduction, Overview and Basic Principles

Lean Six Sigma Intro/ Overview

Pre-Assessment

Four Voices

PDCA

SIPOC –Introduction to scoping

Project Charter

Project Selection

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DAY TWO

Understand the Situation, Making the Invisible Visible

Teams and Team Dynamics

Process Mapping

Metrics and Data Collection

Identifying Waste

Value Add/Non-value Add

Root Cause Analysis

Fishbone (Ishikawa) Diagram

5S

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DAY THREE

Analyze and Improve

Poka-Yoke

Pareto Diagram

Lean Tools: One Piece Flow, Standard Work, Pull, Kanban

Brainstorming/Affinity Diagram

Impact/Control Matrix

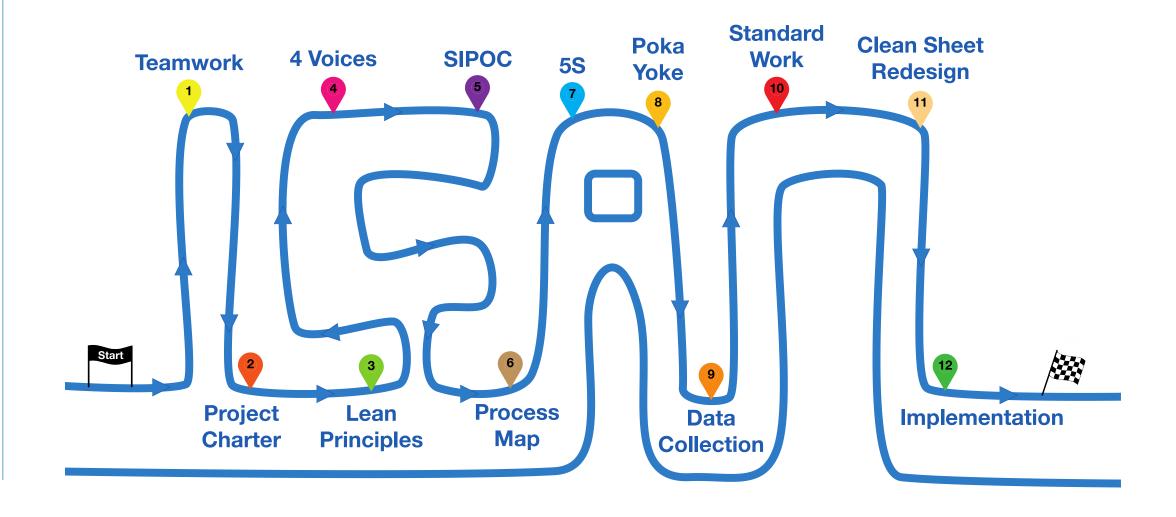Clean Sheet Redesign

DAY FOUR

Implement and Monitor

Making the Future State Happen

Implementation Plans and Tools

Round 2 DOP Simulation

Measures of Success

Taking Lean Back to your Workplace
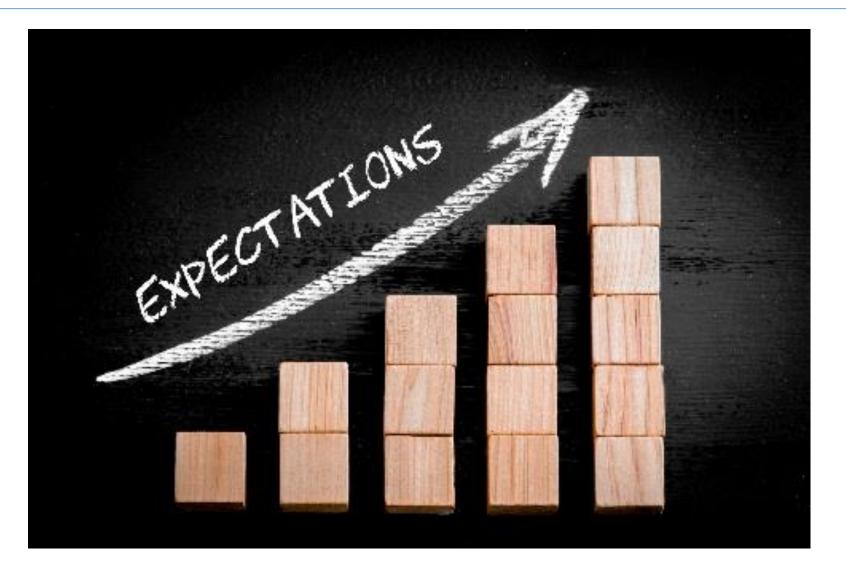
Show What You Know

Managing Change

ROAD MAP

Start

Teamwork — 1
Project Charter — 2
Lean Principles — 3
4 Voices — 4
SIPOC — 5
Process Map — 6
5S — 7
Poka Yoke — 8
Data Collection — 9
Standard Work — 10
Clean Sheet Redesign — 11
Implementation — 12

LEANOhio Boot Camp

3 ZONES

1. Comfort
2. Learning
3. Panic

EXPECTATIONS

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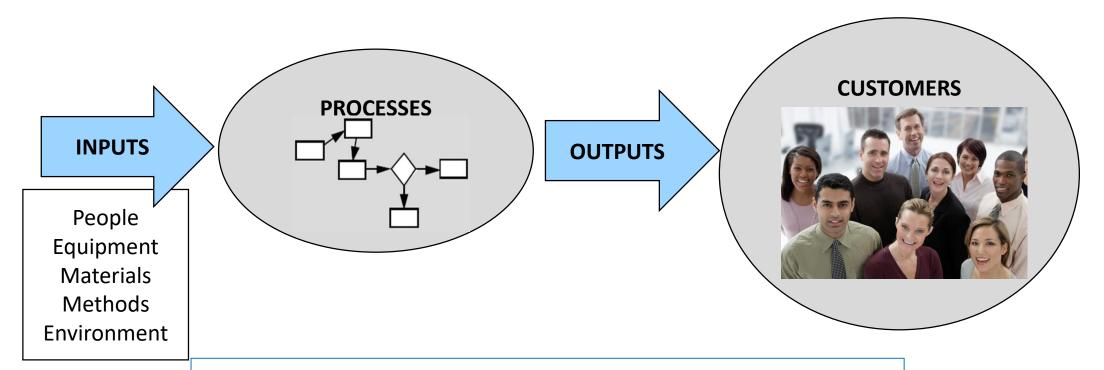
VIDEO:
Fable of
Complexity

WHAT ARE LEAN AND SIX SIGMA?

EVERYTHING IS A PROCESS

*

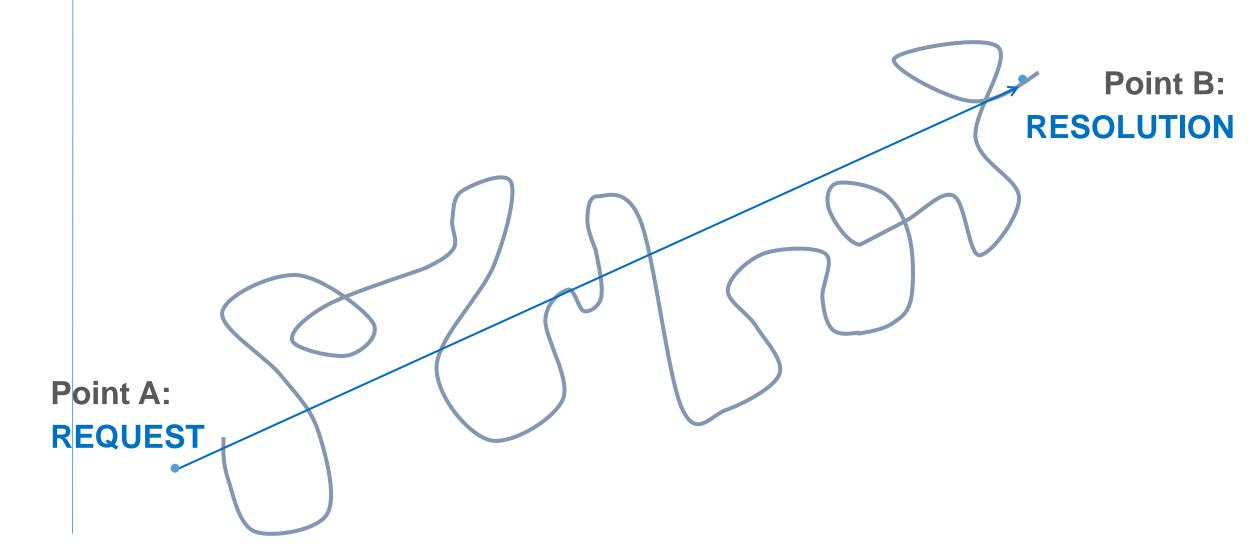"*If you can't describe what you are doing as a process, you don't know what you're doing.*"
W. Edwards Deming

INPUTS

People
Equipment
Materials
Methods
Environment

PROCESSES

OUTPUTS

CUSTOMERS

"*A bad process will beat a good person every time*"
W. Edwards Deming

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PROCESSES TEND TO BE INVISIBLE *

Point B:
RESOLUTION

Point A:
REQUEST

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IN MANUFACTURING OR GOVERNMENT

whatever your results...

- Lead time

- Cycle time

- Errors

- Costs

- Rework

- Customer satisfaction or frustration

*....your process is **perfectly** designed to achieve those results*

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LEAN

A Systematic Approach to identifying and **eliminating waste** through:

- Continuous improvement
- Sequencing the service or product at the pull of the customer

Originated with the Toyota Production System (TPS) in the 1990's

Lean focuses on speed without sacrificing quality for the customer

Lean is a way of working where everyone is maximizing customer value while minimizing waste everyday

Lean Enterprise Institute

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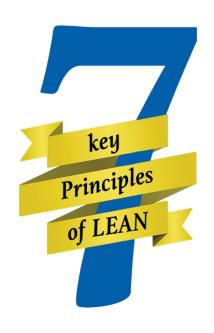# LEAN PILLARS AND PRINCIPLES

Pillars:

- Pursuit of continuous improvement
- Philosophy of respect for people

Principles:

1. Define value in the eyes of the customer
2. Identify the process for a service or product
3. Create continuous flow without interruptions
4. Reduce defects in services or products
5. Let the customer pull what they want
6. Pursue perfection
7. Eliminate or reduce variation (variation is evil)

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ASQ FOUNDATIONS OF LEAN

Lean shines a spotlight on the waste and seeks to eliminate or reduce waste through:

- <u>Teamwork</u> with employees who participate in the decisions that impact their function
- <u>Clean, organized</u>, and well-marked <u>work spaces</u>
- <u>Flow</u> systems
- <u>Pull</u> systems
- <u>Reduced lead times</u> through more efficient processing, set-ups and scheduling

American Society for Quality

www.asq.org

LEAN GOVERNMENT

LeanOhio promotes government that is :

Simpler

Better

Faster

Less Costly

"Lean Takes Time"   Have to slow down to speed up

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SIX SIGMA: 6σ

Origin
Motorola, USA 1986

99% vs. 99.99966%
1,000,000 @ 99% = 10,000
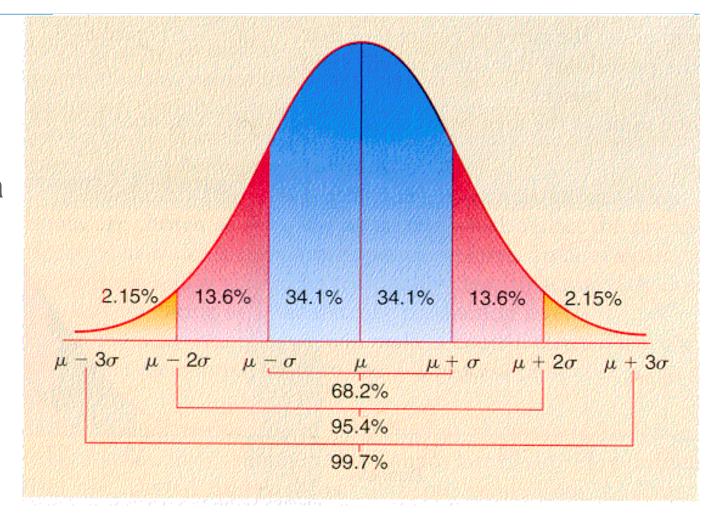1,000,000 @ 99.99966% = 3.4

Minimize variability

-Lean Principle
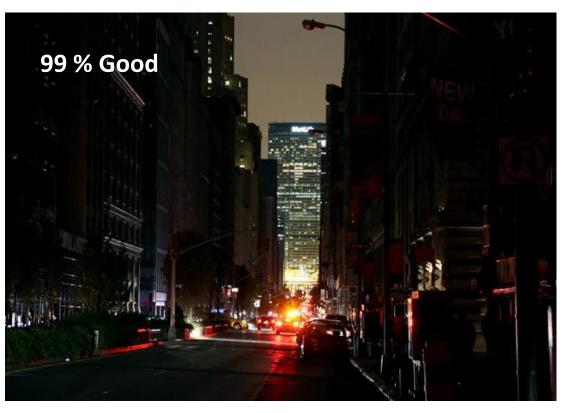
SIX SIGMA: 6σ

Standard Bell Curve

Population n=sample size
Standard Curve = where data lands
$\mu = Mean\ (middle)$

2.15% 13.6% 34.1% 34.1% 13.6% 2.15%

$\mu - 3\sigma \quad \mu - 2\sigma \quad \mu - \sigma \quad \mu \quad \mu + \sigma \quad \mu + 2\sigma \quad \mu + 3\sigma$

68.2%

95.4%

99.7%

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SIX SIGMA: 6σ

No Electricity 7 hrs Each Month

99 % Good

1hr w/o Electricity Every 34 years

99.99966% Six Sigma

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SIX SIGMA: 6σ

200,000 Wrong Rx/year

68 Wrong Rx/year

99% Good

99.99966% Six Sigma

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SIX SIGMA: 6σ

2 Bad Landings Per Airport Daily

99% Good

One Bad Landing Per Airport Yearly

99.99966% Six Sigma

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LEAN SIX SIGMA

LEAN **SIX SIGMA**

Process improvement requires aspects of both Lean and Six Sigma approaches. Both are:

- Customer focused
- Quality focused
- Require strong management support
- Data driven decisions
- Proven continuous improvement methods

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LEAN AND SIX SIGMA

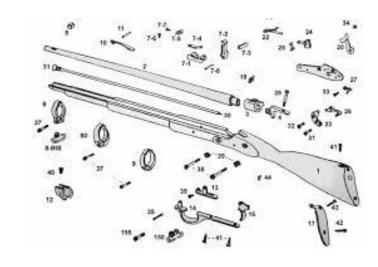| Lean	Six Sigma
PDCA Methodology	DMAIC Methodology
Reduce Time and Waste	Reduce Defects and Variation
Reduce cycle time and bottlenecks, increase flow and pull	Six Sigma Goal: 3.4 Defects per million opportunities
Process Mapping, 5S and 7 Wastes – and more	Data and Analysis Tools – and more
Achieves goals by use of less technical tools such as 5S, workplace organizational and visual controls. **(ASQ**)	Achieves goals by use of statistical data analysis, design of experiments and hypothesis testing. (**ASQ)**
Camo Belts	Green Belts, Black Belts

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HISTORY OF CONTINUOUS IMPROVEMENT

HISTORY OF CONTINUOUS IMPROVEMENT *

1793

Eli Whitney

1800s

Carl Frederick Gauss

HISTORY OF CONTINUOUS IMPROVEMENT *

1901

Henry Ford

HISTORY OF CONTINUOUS IMPROVEMENT *

1940s

HISTORY OF CONTINUOUS IMPROVEMENT

1950s

**Joseph M. Juran
&
W. Edwards Deming**

1970s

Toyota

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HISTORY OF CONTINUOUS IMPROVEMENT *

1980s

Six Sigma

1990s

Black Belt

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HISTORY OF CONTINUOUS IMPROVEMENT *

2000s

transport
time management
motion improvement
LEAN
MANUFACTURING inventory
healthcare?
processing

40% increase
in breakfast and lunch participation rates, doubling program revenue across one district's elementary, middle, and high schools!

$400,000 in cost reductions
for a city school district through route optimization and the elimination of 14 buses.

$200,000 in cost reductions
for a small county school district through the optimization of five bus routes.

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W. EDWARDS DEMING

WALTER SHEWHART

1900 – 1993 Father of the
Modern Quality Movement

1891 – 1967 Father of Statistical
Quality Control, PDCA

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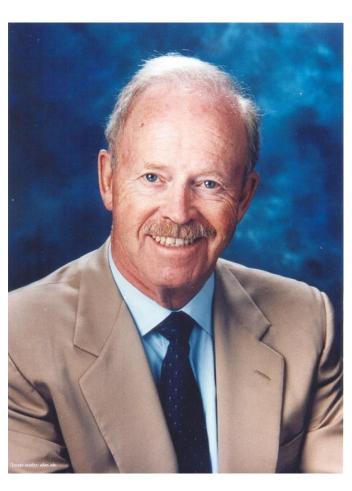
JOSEPH M. JURAN

PHILLIP CROSBY

KAOURU ISHIKAWA

1904 – 2008
Cost of Quality

1926 – 2001
Do it Right the First Time

1915 – 1989
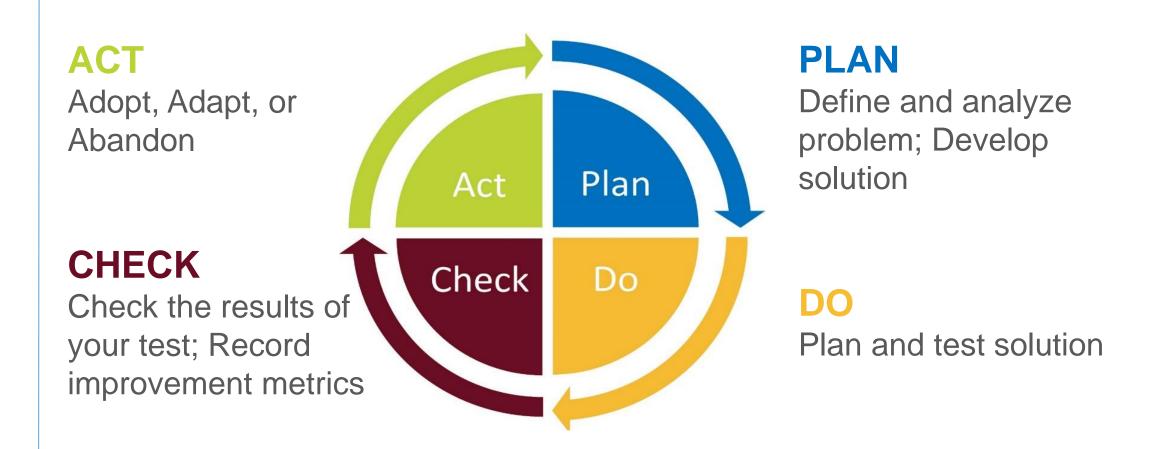Father of Japanese Quality

PROCESS IMPROVEMENT

PDCA

ACT
Adopt, Adapt, or Abandon

CHECK
Check the results of your test; Record improvement metrics

PLAN
Define and analyze problem; Develop solution

DO
Plan and test solution

PROCESS IMPROVEMENT ACTIVITY: CARD GAME

- **Team Leader**
- **Time Keeper**
- **Recorder**

PROCESS IMPROVEMENT ACTIVITY: CARD GAME

Time Sheet	L	E	A	N
Round #1: Goal Time				
Round #2: Goal Time				
Round #3: Goal Time				
Round #4: Goal Time				

PDCA

9. Adopt, Adapt or Abandon Follow-up Monitor

7. Improvement Metrics
8. Check Results

Plan:
1. **Identify and Select Problem**
2. **Define Current State**
3. **Define Desired State**
4. **Analyze**
5. **Select Solution to test**

6. Plan and Test Solution

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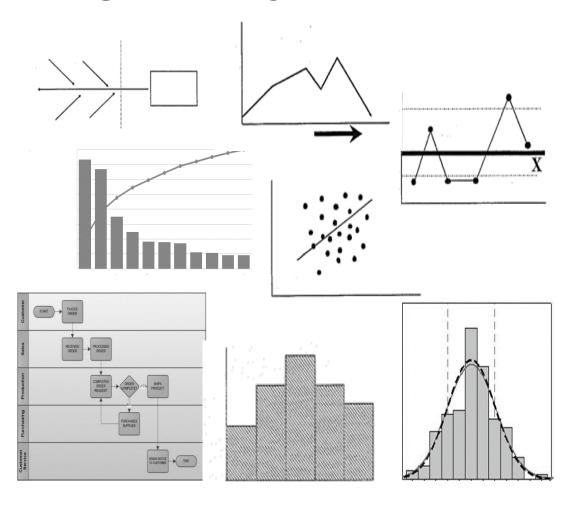
1-45

P1: IDENTIFY & SELECT PROBLEM

- Find a problem or opportunity
- Review background information
  - How do you know it is a problem?
- Identify why change is needed
  - What are the customers saying?
  - What are their needs and expectations?
- Scope the improvement project
  - Develop a SIPOC
  - Develop a Charter

P2: DEFINE THE CURRENT STATE

- Understand the process
- Make the invisible visible
- What are the metrics?
- What is it costing us in time/dollars/staff?
- What is the impact on our customers?

Eight Quality Control Tools

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P3. DEFINE GOALS/TARGET CONDITION

- What is the aim?
- Identify goals.
- Make them SMART!
- What is the gap?
- What are the important aspects of the future target condition?
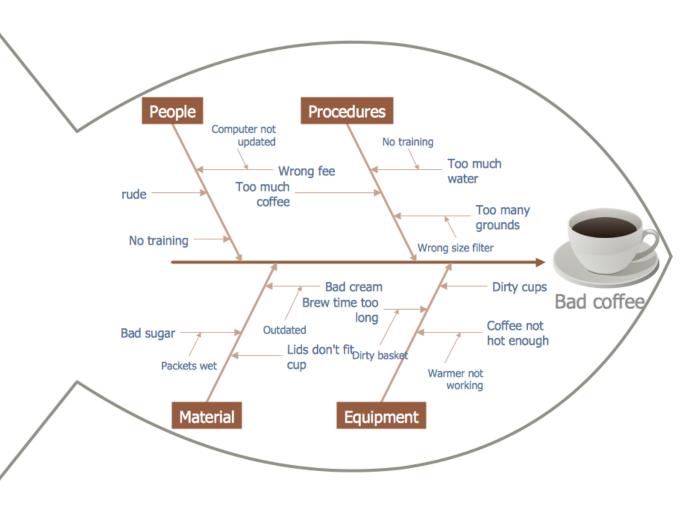- Benefits of moving to the future target condition?

P4. ANALYZE

- What is causing the problem(s)?

- What factors account for the gap between the current state and the goal?

- What does the data say?

- What is the root cause?

Fishbone (Ishikawa) diagram with effect "Bad coffee" and causes:

People: Computer not updated, Wrong fee, rude, Too much coffee, No training

Procedures: No training, Too much water, Too many grounds, Wrong size filter

Material: Bad sugar, Packets wet, Outdated, Lids don't fit cup, Bad cream, Brew time too long

Equipment: Dirty basket, Warmer not working, Coffee not hot enough, Dirty cups
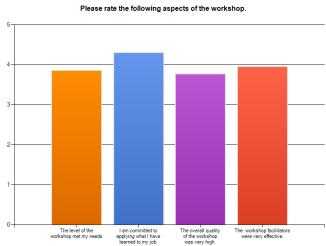
P5: GENERATE POTENTIAL SOLUTIONS

- Review information

- Ensure understanding of causes

- Brainstorm potential solutions

- Evaluate and select solution

- Develop an improvement hypothesis: If we do _____, then we think _____ will happen

D6: TEST YOUR CHANGE

- Develop an action plan to test your improvement theory (hypothesis)

- Implement your plan

- Collect data using key measures

action plan

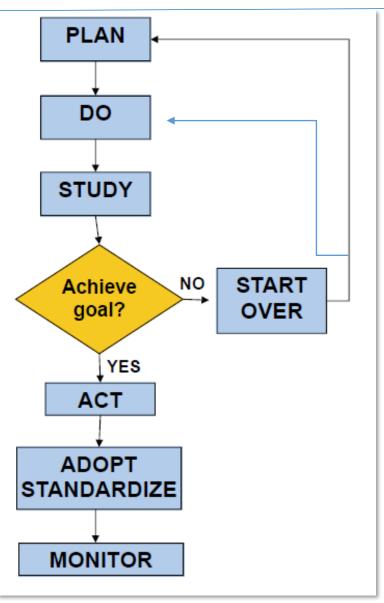Please rate the following aspects of the workshop.

C7 & C8: RECORD IMPROVEMENT METRICS AND CHECK RESULTS

- Evaluate your test data

- Did your hypothesis produce the desired result?

- Ask those affected by the change how it's working
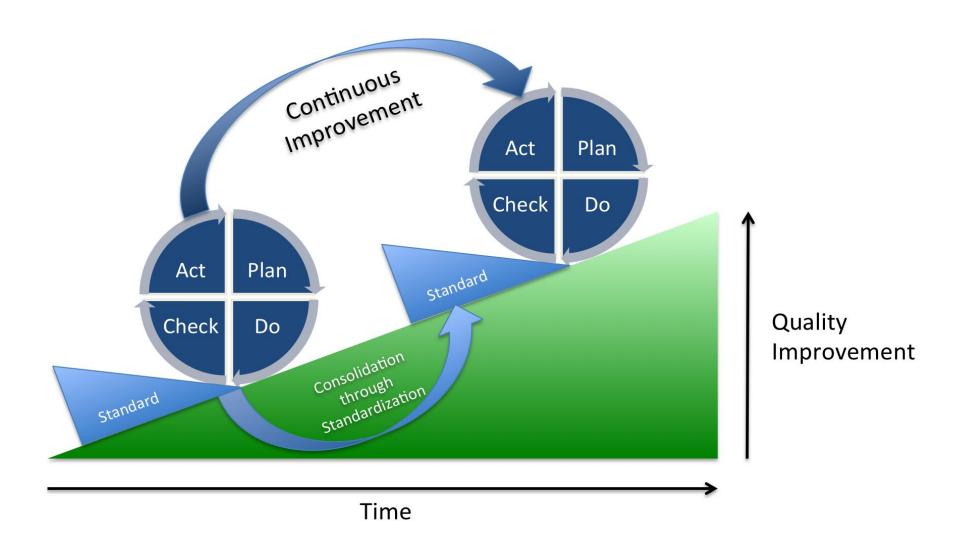
- Refine your improvement as needed

A9: FOLLOW-UP ACTION

- If successful: Implement system-wide, standardize
- If not successful: Try another test solution or
- Start the cycle again
- Repeat cycle as necessary
- Continuously measure
- Plan for the future

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REPEAT FOR CONTINUOUS IMPROVEMENT

PDCA

PLAN

DO

CHECK

ACT

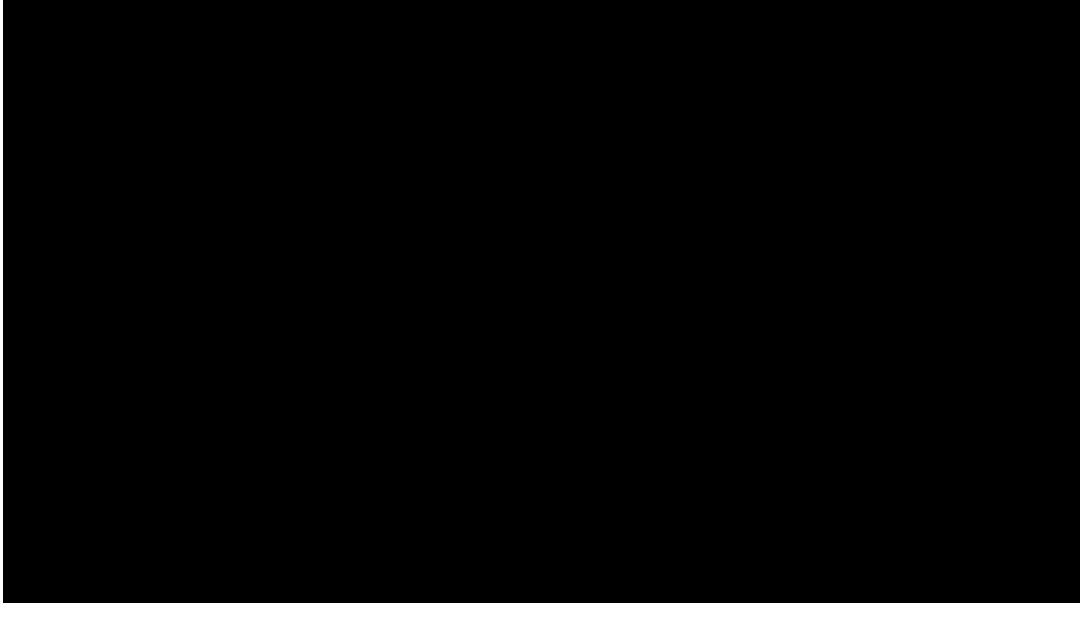| PLAN				
P1	**Identify Problem** (problem selection guide)	**Gather data and background** (How do you know it is a problem?) What, When, Where, How much	**Scope the issue:** Develop SIPOC; Identify customer requirements (survey, focus group, interviews)	**Develop charter/ start A3**
P2	Determine current state (background and measures)	Develop Data Collection Plan and gather data	GEMBA – go observe the process in the workplace. Develop a Process Map	Identify waste (TIM U WOOD) and pain points
P3	Establish target goals/future/desired state	What measures will tell you if you are successful?	Make goals SMART	
P4	Analyze the situation	Examine the data, Understand the causes of problem	Fishbone diagram, Pareto diagram, Run chart, bar chart	Find the Root cause of the problem, 5 Whys
P5	Determine best improvement(s)	Brainstorm improvement ideas, Evaluate (Impact/ control matrix)	Select improvement (s) Use flow, poka yoke, standard work. Develop new process map	State a hypothesis: If we do XXXX, then we think YYYY will happen
DO	Test your Improvement(s)	Plan implementation of a test of the proposed solution.	Implement test solution. Gather data to measure success	Action register, Gantt chart Data collection tools
CHECK/ METRICS	Check/study the results of your test	Evaluate results: Compare before and after measures	Seek feedback from customers	Determine if the actions taken were successful
ACT	Adopt, adapt or abandon. Monitor Tell your Story	Implement standard work. OR test another solution	Monitor: Collect data & review periodically. Track results using visual management	*Tell your story Complete the A3*

Video: Meals per Hour

PDCA, A3, DMAIC

PLAN

DO

CHECK

ACT

PDCA		A3	DMAIC	TOOLS
Plan	Identify the problem or opportunity for improvement	Clarify the problem	Define	Project selection guide Charter, SIPOC, scoping
	Understand the current situation (background & measure)	Break down the problem	Measure	Gemba Walk, Process Mapping, Data Collection
	Identify the goal and the gap	Set a target		
	Analyse the situation (determine root cause)	Root cause analysis	Analyze	Waste – VA/NVA/NVAN, Data analysis, Pareto diagram, Fishbone Diagram, 5 Whys, Statistical Process Control
	Identify potential solution(s), select solution to test. If we do — then —– will happen	Develop counter measures		Brainstorming, Affinity Diagram, Impact/Control matrix, Flow (Batching, Push/Pull) Poka Yoke, 5S, Kan Ban,
Do	Plan and implement a test of the proposed solution	Implement counter measures	Improve	Action Register, Gantt Chart, Data collection
Check	Study the results of the test	Evaluate results		
Act	Act on lessons learned, adjust as needed, Implement system-wide, Monitor	Standardize success, Monitor	Control	Standard work, Visual Management

WHAT IS AN A3?

PLAN   DO   CHECK   ACT

a. A way of thinking

b. A report

c. An 11 x 17 piece of paper

d. An approach to continuous improvement

e. All of the above

WHY A3?

- A3 provides a structured format for problem-solving
- Provides a method for addressing the things that "bug" you or frustrate you
- Reflects the philosophy of *don't blame the people, fix the process!*
- Promotes continuous improvement
- Aligns with PDCA cycle
- Promotes transparency – is visual!
- Tells the story

A3

Title:	Team:
Date Started:	Current Date:	Sponsor:

P1: Background/Why change is needed	**P4**: Analyze	**C7:** Improvement Metrics
P2: Current State	**P5:** Potential Solutions	**C8**: Check Results
P3: Project Goals	**D6:** Action Plan & Test	**A9:** Follow-up and Monitoring

PLAN

DO

CHECK

ACT

Title: Date Started:	Current Date:	Team: Executive Sponsor:
P1: Why change is needed	**P4: Analysis**	**C7: Improvement Metrics**
Why are we working on this problem/opportunity? What is the business case? What is the pain point? What is the impact? Scope?	What is preventing achievement of the goal? What is the root cause or causes of the problem? Fishbone or 5 whys.	Collect data. Check the results of your improvement. Did you close the gap? Simpler, faster, better, less costly.
P2: Current State	**P5: Potential Solutions**	**C8: Check Results**
What is currently happening? Extent of the problem? Data. Statement of the problem. Graphically present a picture of the current state.	Brainstorm solutions. Analyze them. Select a solution to test.	What went well? What didn't? If you didn't achieve goal, then go back to test another solution. If goal is achieved, put into standard work.
P3: Future State	**D6: Action Plan**	**A9: Follow-up and Monitoring**
What specific outcome is required? What is the goal? What is the gap? Specific improvements in performance needed? Pictures/graphs.	Develop an action plan for running your test (or pilot) and implement it.	What is the plan for ensuring that solution benefits are maintained? How will you monitor?

VIDEO:

Lean: BCI
Crime Lab

PLAY TIME:

6 mins 59 sec

FOUR VOICES

4 VOICES

To inform process improvement we need to listen to four voices

Voice of the Customer - VOC

Voice of the Business - VOB

Voice of the Process - VOP

Voice of the Employee - VOE

ACTIVITY: 4 VOICES

Your Movie Theater

You own a local movie theatre You are going on vacation for 10 days You have asked your theatre manager to email you 5 data items every other day.

What do you want to know?

ACTIVITY: 4 VOICES continued

Owner Needs

- Ticket Sales
- Concession Sales
- Income/Expenses/Profit
- What movies came in
- Employee problems
- Who called off
- Customer Issues
- Weather

Customer Needs

- Line Movement
- Good Popcorn
- Reasonably Priced Refreshments
- Clean, Updated Restrooms
- Ambiance/Décor
- Great Sound System
- Friendly & Efficient Staff
- Convenient Parking

Which group can you really influence and control?

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4 VOICES: VOICE OF THE CUSTOMER

Describes the stated and unstated needs or requirements of the customer.

- Identifies the Customer
- Needs
- Drivers
- Critical to Quality
- What they Don't Want
- Meeting Expectations
- Exceeding Expectations

4 VOICES: VOICE OF THE CUSTOMER

Customer needs and expectations need to drive our improvement efforts.

These are usually stated in general terms and need to get translated to more measurable terms.

Customer: "I want a cup of coffee."
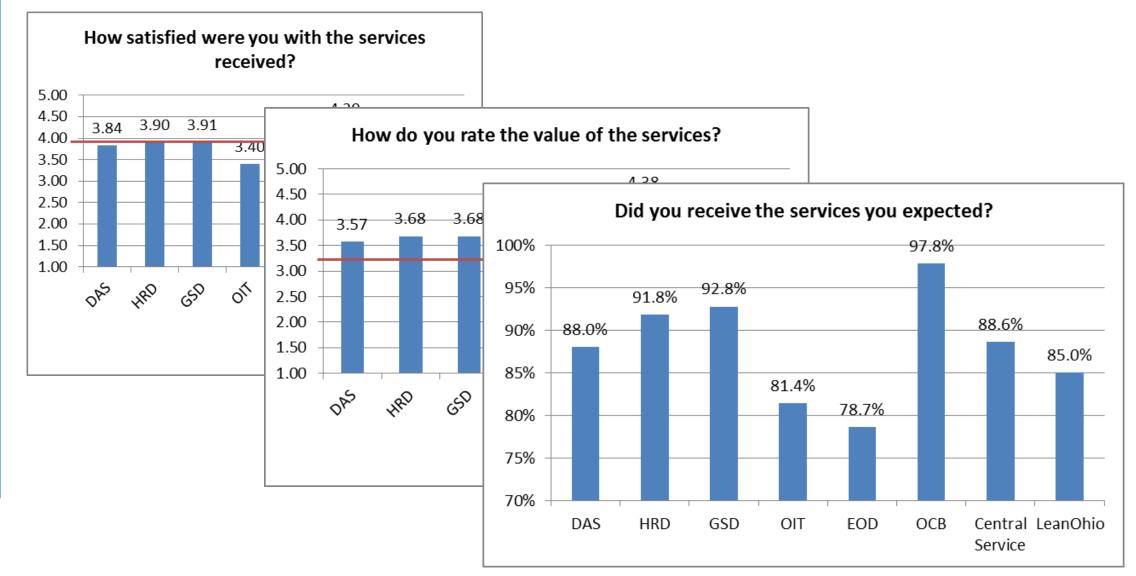
What does that mean?

HOW DO WE KNOW WHAT CUSTOMERS WANT?

DATA. Capturing data from the Voice of the Customer (VOC) is especially important in Process Improvement

- Surveys
- Interviews
- Focus Groups
- Customer Complaints
- Benchmarking
- What others can you think of?

- Consider having your customers participate in an improvement project!

VOICE OF THE CUSTOMER IS MULTIFACETED *

How satisfied were you with the services received?

DAS: 3.84, HRD: 3.90, GSD: 3.91, OIT: 3.40

How do you rate the value of the services?

DAS: 3.57, HRD: 3.68, GSD: 3.68

Did you receive the services you expected?

DAS: 88.0%, HRD: 91.8%, GSD: 92.8%, OIT: 81.4%, EOD: 78.7%, OCB: 97.8%, Central Service: 88.6%, LeanOhio: 85.0%

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VOC CUSTOMER TRENDS

- Immediate feedback – close to the service
- Utilize social media
- Web utilization
- Raised expectations
- Want it faster
- Want it on-line
- Want it INSTANTLY

4 VOICES: VOICE OF THE BUSINESS

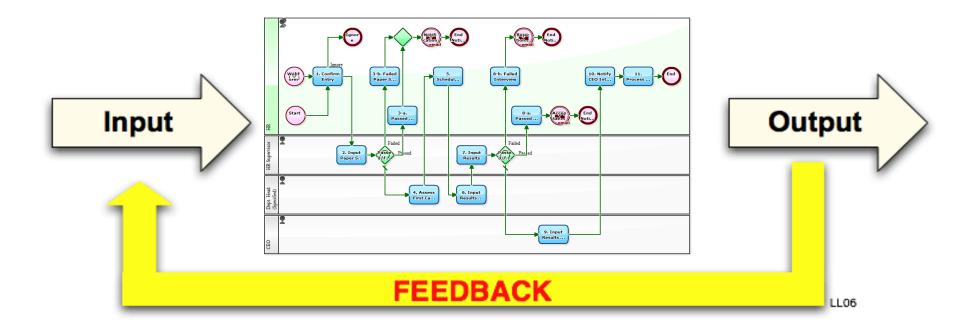**Describes the stated and unstated needs or requirements of the organization**

- Vision
- Mission
- Values
- Financials
- Performance Metrics

4 VOICES: VOICE OF THE PROCESS

Describes what the process is telling you

- What's working
- What's not working
- Process Data provides the voice – the information needed

4 VOICES: VOICE OF THE EMPLOYEE

Describes the front line knowledge and requirements of the employee.

- The people who do the work know the work best!
- Employees are closest to the Customer
- Lean principle of respect for people
- Set them up for Success
- Change can be difficult
- Empowering employees to make change promotes ownership of the work and creates a better place to work

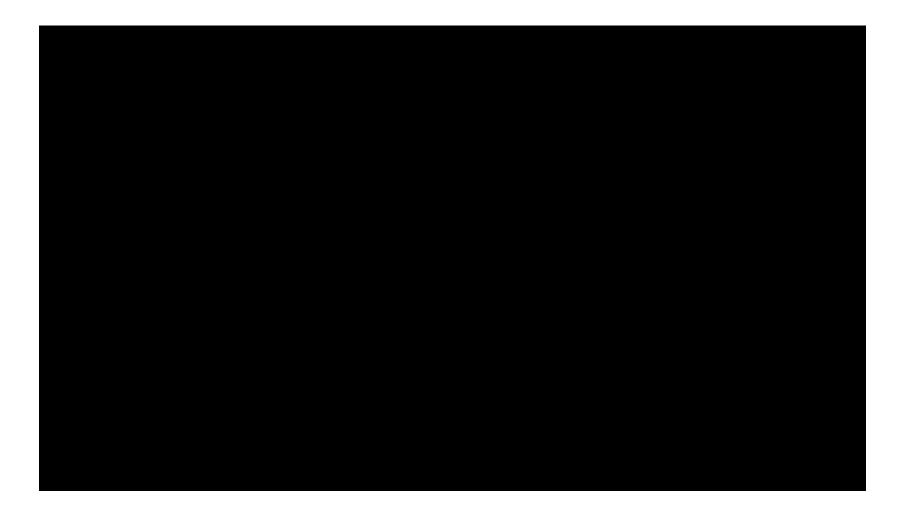**VIDEO:**
(VOC) Seinfeld
Car Reservation

PLAY TIME:
1 mins 54 Sec

DoP APPLICATION SIMULATION

Department of Prevention
DOP
Prevention is our Game

- Department of Prevention (DOP)
- DOP is a Government Organization
- DOP reviews applications from other Government Organizations

DOP Motto: Keeping bad things from happening.

APPLICATION PROCESSING SECTION

- You will be working in the Application Processing Section

- This Section receives applications from government organizations requesting permission to conduct process improvement activities

- DOP processes two types of applications: **Renewal and Initial**

- The section goals are to process applications as quickly and efficiently as possible without losing quality

- The section must process 16 applications every day in order to meet customer demand and avoid a backlog

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DoP SIMULATION RULES

- DOP needs to process 16 apps every day (8 min)
- Each DOP employee is required to work until the end of the day
- Every position has written instructions that must be followed
- Each DOP employee is responsible for getting their own materials
- Materials cannot be shared and must be transported in the authorized folders only
- Each folder can hold only two applications

DoP SIMULATION RULES

- Forms will be processed in batches of two

- Extra materials can be found in the Supply Area

- All DOP employees are responsible for moving their completed work to the next worker

- Folders cannot be moved across the table. All work must travel around the outside of the table

- Running is not permitted

- You are required to follow the written instructions

DoP JOB ASSIGNMENTS

JOB ASSIGNMENT	WORKSTATION
Mail Opener	1
Renewal Processor	2
Initial Processor	3
Legal	4
Approver	5
Addressor	6
Mail Carrier	Mailroom
Senior Processor	Mailroom
Quality Assurance	Floating

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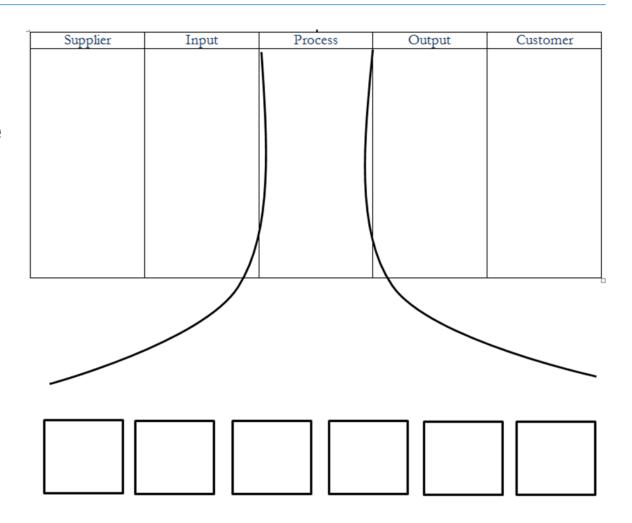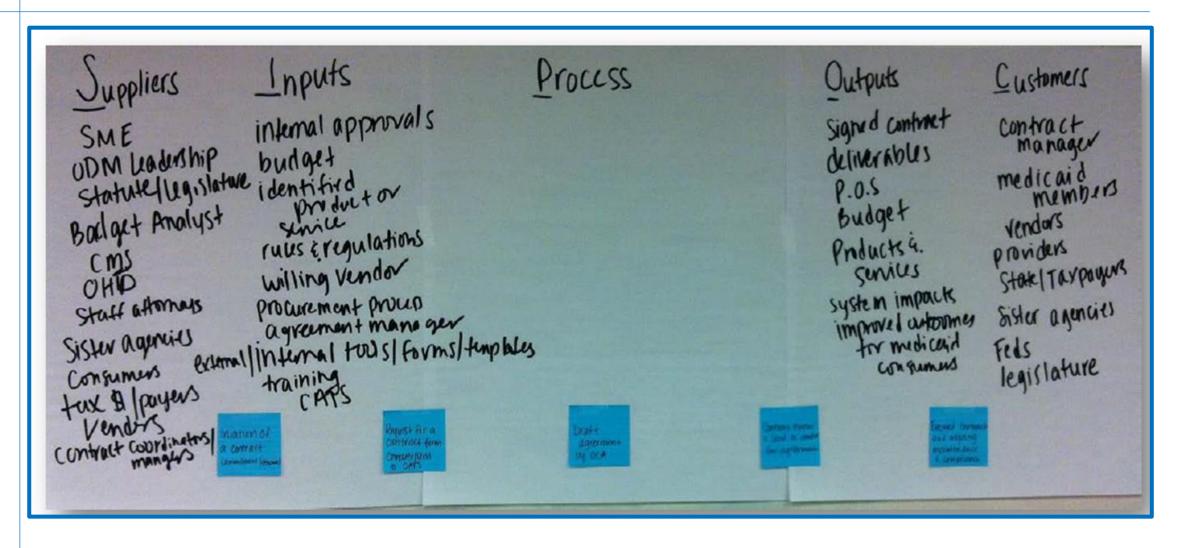
SIPOC

VIDEO:
SIPOC

SIPOC

High Level Tool: 50,000 foot view

Will help you gain a snapshot of the process:

- Suppliers
- Inputs
- Process
- Outputs
- Customers

Supplier	Input	Process	Output	Customer

SIPOC

Suppliers	Inputs	Process	Outputs	Customers
Individuals or organizations that provide inputs to the process.	Material, information and/or services that are required by the process to produce the outputs	The step by step method that produces the output, defined at a very high level - only 5 to 7 steps	Products, information, services and/or decisions that are produced by the process	Those who receive the process output, pay for it or are directly impacted by the process output

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SIPOC

SIPOC: CHOCOLATE CHIP COOKIES

SIPOC: DOP

Supplier	Input	Process	Output	Customer

Facilitation Tips

- 1 person facilitates and posts on the wall
- Facilitator asks the group questions and listens carefully to responses
- Check your and the groups' understanding
- Make sure the group comes to consensus
- Write big enough for everyone to see (use sharpies)

PROJECT CHARTER

PROJECT CHARTER

An authorizing document that defines the project and management support for the project.

- Background
- Opportunity
- Scope
- Measurable Outcomes
- Team Members
- Boundaries
- Project Sponsor(s)

PROJECT CHARTER

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LEANOhio Project Charter

Project/Event Title _____
Project Facilitator _____
Agency/Organization _____
Project Mentor _____
Charter Last Updated Date: _____

Project Background

Problem/Opportunity Statement

SCOPE (DEFINE BOUNDARIES)	First step in the process:
	Last step in the process:

Project Goals

Project Boundaries

Performance Metrics: What measures will tell you if you are successful.	Performance Metrics			
	Current	Goal	Final	% Change

Projected Benefits

Project Team
Team Lead:
Team Champion/Sponsor: _____
Process Owner: _____
Team Members:
Subject Matter Experts:

Project Champion/Sponsor and Process Owner Sign-Off: I am committed to supporting this project and implementing the teams improvements.
Sponsor Signature: _____
Process Owner:

PROJECT CHARTER

Project Contact Information

LEANOhio

LEANOhio Project Charter

Project/Event Title _____

Project Facilitator _____

Agency/Organization _____

Project Mentor _____

Charter Last Updated Date: _____

PROJECT CHARTER

Background and Project Opportunity

Project Background

Problem/Opportunity Statement

SCOPE (DEFINE BOUNDARIES)	First step in the process:
	Last step in the process:

Project Goals

Project Boundaries

PROJECT CHARTER

Problem/Opportunity Statement:

Eliminate data quality errors in the "application review through grant award" timeframe

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PROJECT CHARTER

Improved Statement:

Problem

Quantified

Processing time for application review through grant award disbursement has <u>increased by 40% within the past 3 grant cycles.</u> 75% of our <u>customers/providers have complained about</u> delays ranging from 18 – 60 days for award disbursement which <u>prevents the department from complying</u> to the <u>current policy which states that disbursements must be provided within 10 business days after award approval.</u>

Customer Focus

Critical Output

Impact

PROJECT BACKGROUND AND GOAL

Background:

The Women Infants and Children (WIC) Program provides nutrition education, and benefits to eligible Ohio families. Participants shop local retailers or farmers markets for highly nutritious foods on the authorized foods list (AFL) using their prescribed WIC benefits. ODH WIC reviews brand-specific manufacturer requests for product inclusion to the AFL and determines appropriateness of each product. 24% of registered mail submission requests returned as undeliverable in 2017. 64 hours dedicated to correcting addresses and reissuing portal passwords to manufacturers in 2017. Majority of portal submissions required correction. 2 major manufacturers missed 2017 submission deadline because of mailing problems.

Goal:

Simplify the process for adding products to the WIC Authorized Foods List (AFL) to reduce rework and delays, while maintaining program integrity and meeting USDA requirements so that WIC participants have increased access to nutritious foods.

PROJECT CHARTER Scope, Goals and Boundaries

Project Background		
Problem/Opportunity Statement		
SCOPE (DEFINE BOUNDARIES)	First step in the process:	
	Last step in the process:	
Project Goals		
Project Constraints		

PROJECT CHARTER

Metrics, Benefits, Members, and Sign-Off

Performance Metrics: Measures that will tell you if you are successful	Performance Metrics			
	Current	Goal	Actual	% Change

Projected Benefits

Project Team

Team Lead: _____

Team _____

Champion/Sponsor: _____

Process Owner: _____

Project Champion/Sponsor and Process Owner Sign-Off: I am committed to supporting this project and implementing the team's improvements.

Sponsor Signature: _____

Process Owner: _____

PROJECT CHARTER EXAMPLE

Problem/Opportunity Statement: Client wait times are too long

Project Goal: Minimize client wait times and reduce unnecessary interruptions of the front desk reception staff

Scope:

First step: Client presents for services and is signed in by front desk staff
Last Step: Client leaves clinic property

Performance metrics:

- Sign-in sheet data

- Client progress notes with service start/end times

- Schedule of appointments for each practitioner

- Number of clients who repeatedly approach window

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Project Charter

Project/Event Title	Application Processing
Project Facilitator	
Agency/Organization	DOP
Project Champion	Instructor
Charter Last Updated Date	

Project Background

Applications are taking too long to process. Customers are complaining because we are delaying their projects getting started. There is an on-going backlog. We can't ever get caught up. Staff are stressed out too.

Problem/Opportunity Statement

Customer requirements for timely response means processing 16 DOP Applications per work day. Currently we are averaging 2.75 days to process 16 applications which means we are falling more behind every day and customers are not happy. We need to improve this process to at least meet customer requirements.

SCOPE (define boundaries)	**First step in the process:**
	Application is received in the mail room
	Last step in the process:
	Customer receives notification of approval or denial of

FINDING PDCA PROJECTS

FINDING PDCA PROJECTS

- Performance or Strategic Plan measures
- Evaluations/audits of programs or administrative systems and functions
- Regular surveys of employees
- Customer service data
- Your customers are complaining
- When something bugs you
- You find yourself saying, there's got to be a better way!

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PROJECT SELECTION PITFALLS

- Morale, communication, etc.

- Preconceived solutions

- Small or trivial – doesn't matter to anyone

- Other peoples' problems

- The boss' policy decisions

- Sacred cows

- You are the primary customer

- Something that is/will be undergoing major change

PROJECT SELECTION

1. Generate a list of ideas of improvement opportunities

2. Clarify those ideas

3. Reduce the list and prioritize

4. Using the Project Selection Criteria, choose the one idea that is most likely to be a successful first process improvement project

5. Pair up with 1-2 others and share ideas. Clarify for each other and make sure the selected projects fit the criteria.

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Criteria for Project Selection	Idea 1	Idea 2	Idea 3
1. Technical Issues			
Is it a process?			
Is the scope manageable?			
Can it be reliably measured?			
What data are available?			
2. Strategic Issues			
Is it important?			
Is it a "sacred cow"?			
Does it support the organization's priorities?			
Customer focus?			
High probability of success in 3-6 months?			
3. Empowerment Issues			
Is it within my/our control?			
Can I/we devote adequate time to it?			
Do I/we already know the solution?			
Is the organization prepared to implement change?			
Do we have Leadership Support?			

PROJECT SELECTION

Project idea:

Improve the water heater inspection process (too much rework and call backs)

Reality Check:

✓ *Process*
✓ *Measurable*
✓ *Important to customers and staff*
✓ *We control the process*

PROJECT SELECTION

Step 6. Identify the <u>major steps </u>in the process: First step, last step, 3-5 steps in between

Identify the
- Outputs (Completed Inspection)
- Customers (Home Owners)
- Inputs (Phone calls, schedules, documents)
- Suppliers (Home owners, clerical staff, inspectors)

This will help you determine who needs to be on your team!

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Request from customer for inspection is taken & logged

↓

Requests assigned to inspectors

↓

Appointments are scheduled

↓

Inspector calls homeowner for information & directions

↓

Inspector goes to home & performs inspection

↓

Inspector returns to office & completes paperwork

PROJECT SELECTION

IF you need a team for this project, Identify needed <u>team members</u>

1. *Inspector A*
2. *Inspector B*
3. *Supervisor*
4. *Clerk*
5. *Customer Service Representative*

- Identify <u>data</u> needed to measure improvement

- Develop a <u>project goal</u> statement

- Develop a <u>Team Charter</u>

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END OF DAY

- **Questions**
- **What Went Well**
- **Lessons Learned**

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