

Planning an Improvement Project



Office of Process Simplification
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Getting Started – Operational Framework

- Improvement work results in change.
 - simplify steps in a process
 - eliminate duplication
 - optimize use of resources
 - improve communication
 - enhance overall quality of service

- To facilitate effective change:
 - need to understand the current process
 - how to improve it
 - plan and implement change
 - measure success of change

Improvement Methodologies

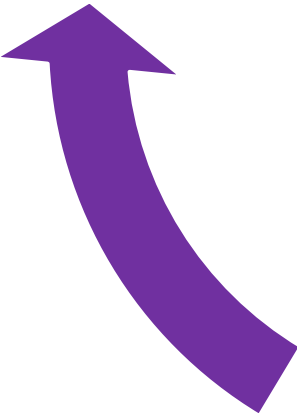
- Many different methodologies
 - Business Process Redesign: discover/redesign/realize
 - Six Sigma: define/measure/analyze/improve/ control
 - Deming Cycle: plan/do/check/act
 - Project Management:
initiate/plan/analyze/design/test/build/deploy/close
 - Penn State IMPROVE:
identify/map/prepare/research/organize/verify/evaluate

- All follow and adhere to same basic, underlying principles to promote change by assessing current process, defining desired process, determining the gap, and taking action to implement the desired.



REALIZE

DISCOVER



REDESIGN

Discovering Opportunities for Improvement

- Ask those whom you serve about service – assess customer satisfaction or complaints
- Reoccurring problems or errors
- Process that takes a long time or significant resources to complete
- Excess steps in a process that don't add value
- Employees' ideas and suggestions for improvement
- Learn from other units, institutions, or organizations

Purpose of a Charter or Scope Document

- Clearly articulate and document agreed upon issues, goals, and objectives of the project. Projects have a beginning and an end.
- Establish a common understanding about the purpose of the project.
- Ensure the project stays on track and on time.

Common Components of a Scope Document



- Project sponsor and owner(s)
- Project description, purpose, and goals
- Projected timeline
- Measurable outcomes and results
- Resources required
- Team members

Project Description, Purpose, and Goals

Projected Timeline

- Description of the problem
- Case for why this project and why now
- The intended outcome of the project
- Specific goals – sets the boundaries of the project, deters scope creep
- Commit to milestone and completion dates
 - Phased approach – segment the work into phases: assessment of current process; redesign of a new process; implementation of the redesigned process

Measurable Outcomes and Results

- How will you be able to gauge success? How will you know if the effort had an impact and achieved the results you expected?
- Can you compare performance over time? (baseline data)
- Who will be responsible?

Resources Required and Team Members

- Financial and human resources required; time commitment including meeting frequency and duration; other resources available to the team
- Establishing a team
 - 4-7 members
 - knowledge or responsibility for work
 - end user
 - team leader

Activity

- Critique a scope document

Other Considerations as You Get Started



- Do people care about this project?
- Assess potential resistance
- Understand the barriers and drivers for change
- Team development
- Communication plan

Tools to Understand the Current Process



- Interviews, surveys, and focus groups
- Process mapping
- Root cause diagrams
- Pareto charts
- Histograms

Tools to Assist with the Redesign of Processes



- Benchmarking
- Brainstorming
- Site visits
- Interviews, surveys, and focus groups
- Process mapping

Concluding a Project



- Document the project work and outcome in a written report
- Communicate
- Periodically re-evaluate

Process Improvement Resources

- Office of Process Simplification,
<http://www.virginia.edu/processsimplification/>
- National Consortium for Continuous Improvement in Higher Education, <http://www.ncci-cu.org/>
- Other higher education institutions
 - University of Wisconsin Madison – Office of Quality Improvement
 - Penn State University - Office of Planning and Institutional Assessment
 - University of Minnesota – Office of Service and Continuous Improvement



QUESTIONS?