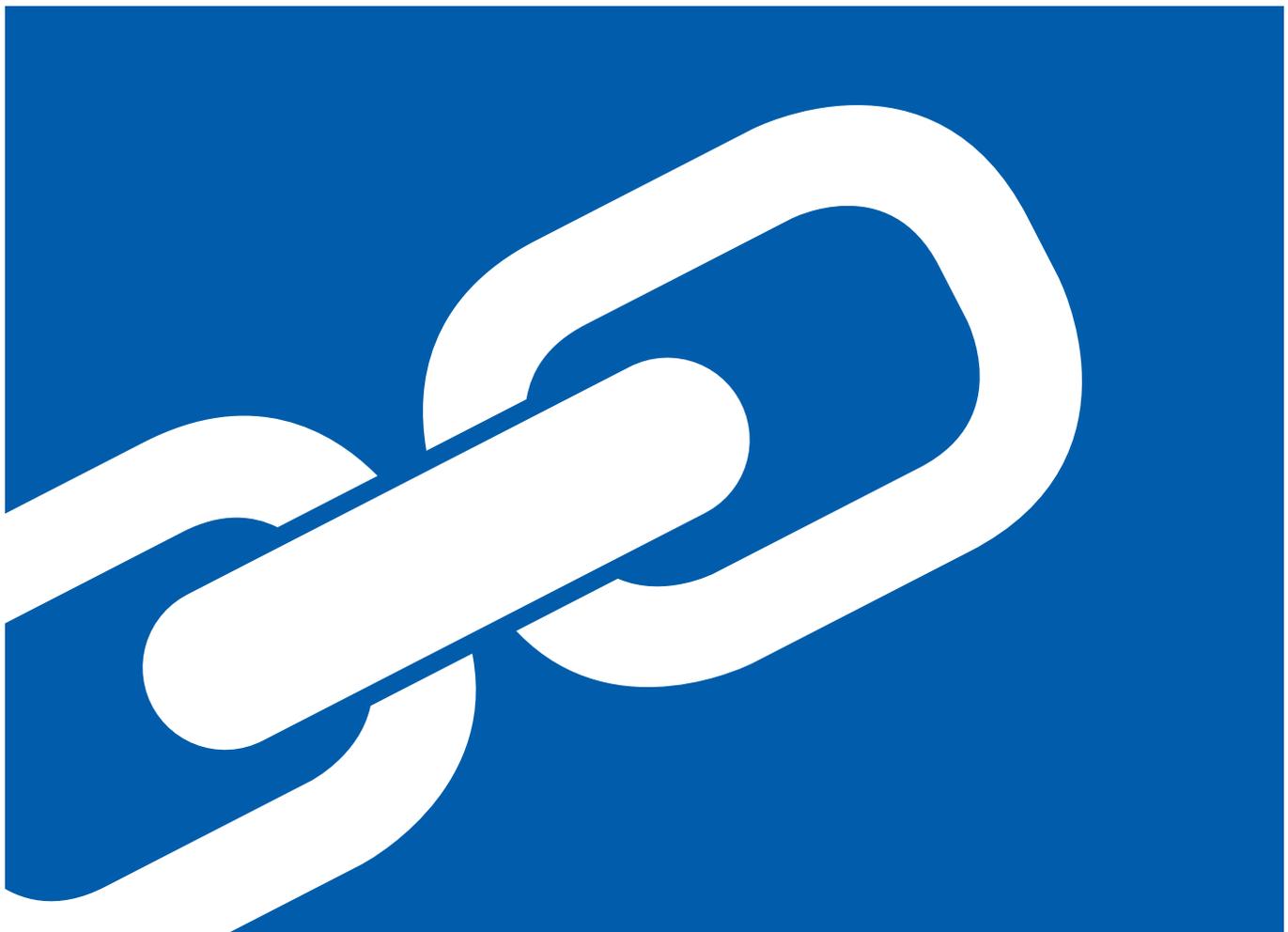


LeanOhio Lean Liaison Orientation Packet

A guide for Lean Liaisons to bring Lean Six Sigma to their agency



LEANOhio SIMPLER • FASTER • BETTER • LESS COSTLY

So they made you a Lean Liaison...

Now what?

This document is to be a helpful guide for current and new Lean Liaisons as they work to bring Lean Six Sigma to their agency. These materials are here to help you work with LeanOhio, those trained in your agency and your leadership. This document is often used as an orientation guide with new Lean Liaisons.

Items included:

- LeanOhio Mission
- LeanOhio Overview
- The Role of Agency Lean Liaison
- LeanOhio Website
 - LeanMatch
 - Lean Calendar
- Agency Circles and Connectors
 - Lean Liaison Quarterly Meetings
 - Lean Six Sigma Project Report Outs
- Training
- Project Expectations for Belt Candidates
- Registering LeanOhio Training
 - Camo Belt
 - Green Belt
 - Black Belt
- Types of LeanOhio Projects
- Process Improvement Scorecard
- Entrepreneur in Residence
- Lean Local Initiative
- LeanOhio Staff Contact List



LeanOhio Mission

The mission of LeanOhio is to make government services in Ohio simpler, faster, better, and less costly. Using the improvement methods of Lean and Six Sigma, Ohio's state agencies are cutting red tape, removing inefficiencies, improving customer service, and achieving measurable results.

The LeanOhio Network includes hundreds of state employees who have been involved in Kaizen events and other improvement projects. Many have earned Green Belt or Black Belt certification. The Network includes state employee unions and members who promote Lean, improve processes, and partner with the state to teach Lean tools and strategies.

Each state agency has a Lean Liaison. This ensures communication and coordination throughout state government. Liaisons identify improvement opportunities, engage agency staff in improvement efforts, and ensure that changes are implemented and sustained.

LeanOhio is coordinated by the LeanOhio Office, within the Ohio Department of Administrative Services. Office associates are Lean Six Sigma experts who serve as internal systems improvement consultants.

LeanOhio Overview

Major Process Improvement



Consultants from the LeanOhio Office lead major process-improvement events. In 5-day Kaizen events, teams transform key processes – eliminating red tape, removing bottlenecks, reducing process time, strengthening service, and saving money. Since January 2011, LeanOhio has led nearly 70 Kaizen events.

lean.ohio.gov/results

Lean Six Sigma Consultation



LeanOhio consultants assist agencies in using Lean Six Sigma tools to find major improvement opportunities (through value-stream mapping), mistake-proof their forms (poka-yoke), reorganize the workspace (5S), analyze data, hear from customers, and more.

lean.ohio.gov/consult.aspx

Training and Development



The LeanOhio Office has a robust program of training, development, and mentoring. Offerings include LeanOhio Boot Camp (1 week), Green Belt Training (2 weeks + project), and Black Belt Training (5 weeks + project).

lean.ohio.gov/training

LeanOhio Network



The LeanOhio Network unites State employees who have attended LeanOhio training. The group is 700 people strong, with 70 Black Belts and 170 Green Belts as of December 2015. Among state governments, Ohio leads the nation with the most in-house Lean expertise.

lean.ohio.gov/network

Entrepreneur in Residence



The EIR Program has three small-business owners working with the LeanOhio Office. This is bridge-building at its best. EIRs and their businesses gain process-improvement know-how, and state government gains private-sector insights and best practices.

lean.ohio.gov/EIR

Lean in Local Government



Designed for Ohio's political subdivisions, the Local Government Efficiency Program includes scholarships for training and grants for improvement projects. The training is tailored to the public-sector workplace.

lean.ohio.gov/local

Improvement Resources



To power new thinking and higher levels of improvement, the LeanOhio Office routinely adds to its library of improvement resources.

lean.ohio.gov/resources.aspx

The Role of the **AGENCY LEAN LIAISON**

Each Cabinet agency has a Lean Liaison. This person fills an essential role that involves sharing information about Lean, promoting its use, coordinating agency Lean activities, serving as a link to the LeanOhio Office, and more. The full role is described below.

Throughout the AGENCY

- Communicate what Lean is all about and how it's making state government simpler, faster, better, and less costly. Your agency communications can include:
 - How Lean and Six Sigma are being used in the agency
 - Success stories, measurable results
 - Training opportunities
- Promote and coordinate Lean training of agency staff (Boot Camp, Green Belt, Black Belt).
- Publicly recognize those individuals who are using Lean to effect change and achieve results.

With the AGENCY'S DIRECTOR AND SENIOR STAFF

- Promote a plan for advancing Lean in the agency. Keep it updated to ensure ongoing progress.
- Keep leadership informed of Lean activities inside the agency, in other agencies, and statewide.
- Promptly fill requests when senior staff ask for Lean-related information.
- Provide guidance to ensure that projects align with agency goals.
- Encourage leadership to recognize people who are putting Lean to work.

With BELT-TRAINED COLLEAGUES

- Promote training opportunities.
- Work closely with your agency's embedded Black Belt(s) to ensure their expertise is fully utilized.
- Ensure that all Belt-trained staff are identifying, starting, and completing projects.
- Provide needed support, especially when trained colleagues are working on their first projects.
- Recognize colleagues as they move from learning Lean to using Lean and achieving results.
- (If the agency's embedded Black Belt is not also the Liaison, the Black Belt can assist with all of the above.)

With PROJECT SPONSORS

- Team up with the LeanOhio Office to guide the scoping process so that improvement projects are set up for success.

With TEAMS AND TEAM LEADERS

- Ensure that projects are facilitated by Lean-trained staff. (For instance, every Kaizen event needs at least two experienced Kaizen practitioners.)
- As projects unfold, answer questions relating to the improvement process – or find people who can.
- After events, follow up with teams and attend update meetings to ensure implementation and sustained results.

With the LEANOHIO OFFICE

- Serve as the link between the LeanOhio Office and agency leadership.
- Know what's available from the LeanOhio Office, and put the resources to work. (Go to lean.ohio.gov for guides, tools, and more.)
- Contact the LeanOhio Office for help with planning, prioritizing, and implementation.
- Request help with big Lean Six Sigma projects.
- Submit key Lean-related agency measures, which are used to calculate statewide results.
- Following major improvement events and projects, submit key info and before/after data.

LeanOhio Website

The LeanOhio website: lean.ohio.gov is full of additional resources including: results from events and projects, headlines, additional information on training, one pagers, network links and LeanOhio calendars. We strongly encourage you to visit the website for new information and resources you can use to make your agency better!

lean.ohio.gov

LeanMatch

The website also features LeanMatch where upcoming trainings, projects, and improvement events that call for Lean know-how are listed. It is a place for those in the network that have participated in LeanOhio training, and be matched for events or projects that need additional resources. If you have anything that you would like to be placed on the LeanMatch board please contact your Agency Connector. Click here to view current LeanMatch opportunities:

lean.ohio.gov/match

Calendar

The LeanOhio website features two calendars: Calendar for State Employees and Calendar for Local Government (LGEP). The state calendar features schedule Lean Six Sigma trainings, Kaizen Events and other upcoming LeanOhio events. Click here for a preview of scheduled events:

lean.ohio.gov/Calendar



LEAN LIAISON ROLE IN BRIEF:

- Communicate and promote Lean
- Coordinate activities
- Provide guidance
- Support projects
- Track and report results
- Recognize and celebrate success
- Build bonds with the LeanOhio Office and with other Liaisons
- Keep learning and growing

Agency CIRCLES AND CONNECTORS

To strengthen Lean-related communication and support throughout state government, agencies and boards/commissions are organized into small groups of agency Lean Liaisons (known as circles). Each has an assigned contact (connector) from the LeanOhio Office. Lean Circles convene on a regular basis to share best practices and provide cross-agency support.

AGENCY CIRCLES:

BUSINESS AND INDUSTRY

Lean Connector:
Scot Burbacher

- Public Utilities Commission
- Insurance
- Industrial Commission
- Bureau of Workers' Compensation
- Development Services Agency
- Commerce
- Taxation

Scot.Burbacher@das.ohio.gov
614-728-8411

PUBLIC SAFETY AND CRIMINAL JUSTICE

Lean Connector:
Denae Kotheimer

- Adjutant General
- Department of Public Safety
- Veterans Services
- Department of Rehabilitation and Correction
- Department of Youth Services
- Ohio Supreme Court

Denae.Kotheimer@das.ohio.gov
614-728-2994

INFRASTRUCTURE AND ENVIRONMENT

Lean Connector:
Michael Buerger

- Department of Agriculture
- Department of Natural Resources
- Department of Transportation
- Environmental Protection Agency
- Ohio Turnpike Commission

Michael.T.Buerger@das.ohio.gov
614-466-6023

ADMINISTRATION AND FINANCIAL

Lean Connector:
Meghan Altier

- Department of Administrative Services
- Department of Higher Education
- Office of Budget and Management
- Lottery Commission

Meghan.Altier@das.ohio.gov
614-466-6024

HEALTH AND HUMAN SERVICES

Lean Connectors:
Racquel Graham

- Aging
- Developmental Disabilities
- Job and Family Services
- Medicaid
- Health
- Mental Health & Addiction Services
- Health Transformation
- Opportunities for Ohioans with Disabilities

Racquel.Graham@das.ohio.gov
614-466-6022

AUDITOR, OAG, EDUCATION, BOARDS & COMMISSIONS

Lean Connector:
Brandi Crowley

- Auditor of State
- Attorney General
- Education
- Boards and Commissions

Brandi.Crowley@das.ohio.gov
614-995-0945

Lean Liaison QUARTERLY MEETINGS

Lean Liaison Meetings are conducted quarterly in order to communicate updates and new initiatives to the network through the Lean Liaisons and Black Belts. These meetings give time for Lean Liaisons to meet with their peers from other agencies and your agency connector. If you need to know who is currently trained in your agency you can check out the website or contact your Lean Connector.

Lean Six Sigma PROJECT REPORT OUTS

Green Belt and Black Belt candidates report out on their projects quarterly at the Lean Six Sigma Report Outs. These events are designed to give current Belt candidates an opportunity to present their project status to their management, champions, and peers. We encourage everyone interested in the Lean Six Sigma methodology, or those who have a vested interest in the current projects, to attend.



TRAINING

The LeanOhio Office provides a full range of learning opportunities. Included are overview sessions, White Belt Training (see below), Belt Certification (Yellow Belt, Green Belt, Black Belt), focused intensives (e.g., process mapping, 5S+, poka-yoke), and more. Training sessions are led by LeanOhio staff, LeanOhio Network members, and external experts.

Executive Overview Sessions

These special sessions are scheduled as needed. Ranging from one to three hours, they provide an overview of LeanOhio along with additional information tailored for the group. For example, a session might go into greater depth on how to identify, initiate, and support improvement projects within an agency. Overview sessions are often delivered to agency leaders and senior staff.

Intended for: State government agency leadership

Length: 1-3 hours (based on request)



White Belt Training

White Belt training provides participants an overview of LeanOhio's services and introduces some of the most common used Lean Six Sigma tools.

Intended for: State government employees

Length: 2-3 hours



Yellow Belt Training

Yellow Belt participants complete two days of training and gain an overview of the tools, techniques, and methods of Lean, Kaizen, and Six Sigma. These tools focus on identifying, implementing, and managing quality and continuous improvement processes. Following this training, participants are expected to have a basic understanding of Lean and Six Sigma principles, and to promote Lean and Six Sigma in their agencies.

Intended for: State government and OCPM program participants

Length: 2 days • Participants receive a Yellow Belt pin



LeanOhio Boot Camp: Transforming the Public Sector

LeanOhio Boot Camp is an intensive week-long training that gets people learning and using Lean methods and tools. The entire program is tailored to the public-sector workplace and public-sector processes. This is practical training aimed at generating results. Participants will be able to use their new knowledge and skills immediately – to make government simpler, faster, better, and less costly. (Belt earned after demonstrating use of a Lean tool in the workplace.)

Intended for: State and local government

Length: 1 week + Project

Belt earned: Camo (after completing project)



Green Belt Training

Green Belt training serves as the foundation for learning about Lean and Six Sigma, and about practical process improvement tools, techniques, and applications for overall improvements in the workplace. Participants are required to apply the knowledge and skills back in their agencies for process improvement projects, and to collaborate and mentor with other participants through their network of facilitators. (Belt earned after completing a Lean project.)

Intended for: State government

Length: 2 weeks + Project (1st week is Boot Camp training)

Belt earned: Green (after completing project)



Black Belt Training

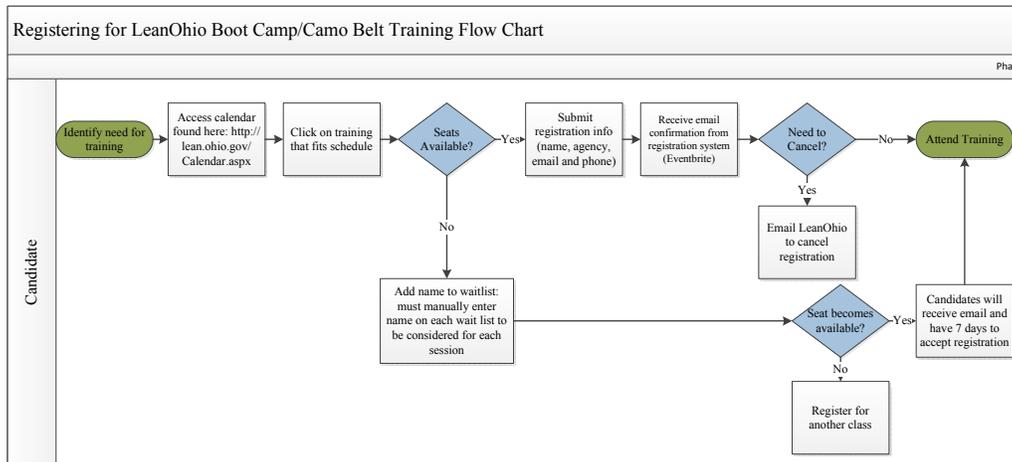
Black Belt training is an intensive five-week course (extending over a number of months) focused on Lean and Six Sigma principles and tools. The course provides instruction and practice on methods to cut waste, save time, increase customer focus, and reduce costs. A full week focuses on how to scope and conduct a Kaizen event. Black Belts can collect and analyze data, co-facilitate Kaizen events, guide other types of improvement projects, and measure agency results.

Intended for: State government

Length: 5 weeks of training over approximately 6 months (3 weeks for Green Belts)

Belt earned: Black (after completing and reporting on a data-rich Black Belt project that will be assigned by the trainee's agency).

Registering for Boot Camp/Camo Belt Trainings



Registering for LeanOhio Boot Camp/Camo Belt Trainings Narrative:

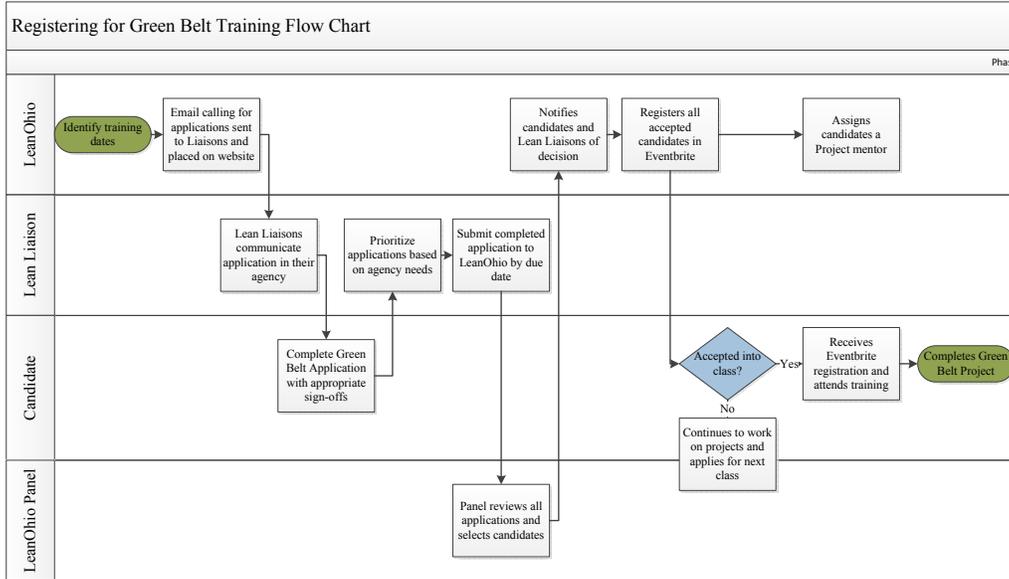
LeanOhio Boot Camp (Camo Belt) is open to any state employee. Candidates are encouraged to consult their Supervisor(s) and Lean Liaison prior to enrolling in this course to ensure approval.

To register for an upcoming LeanOhio Boot Camp (Camo Belt), candidates access the LeanOhio calendar found here: <http://lean.ohio.gov/Calendar.aspx>. Candidates then locate a training that fits their schedule and click on that training (all Boot Camp sessions have been listed in pale green). When the candidates click on that training date it will provide them with the location and a link to register. The link to register will take them to the Eventbrite registration page. Candidates simply fill in the registration information (name, agency, email and phone number), press submit, and are registered for the class. Additionally, candidates will receive a confirmation email from Eventbrite (If they did not receive an email confirmation they should be instructed to check their spam folder).

If the session is full candidates may add their name to the wait list. If there are cancellations, LeanOhio will open up spots to individuals on the wait list. If a spot becomes available, the candidate will receive an email from Eventbrite and have seven days to accept the registration. By putting their name on the waiting list for a session, they are only on the wait list for that session. The candidate must manually enter their name on each wait list to be considered for each session. We encourage individuals to add names to wait lists so LeanOhio has a better gauge of customer demand and can schedule additional classes if needed.

If candidates need to cancel their registration, please email LeanOhio (Meghan.altier@das.ohio.gov) or your agency connector to cancel the registration.

Registering for Green Belt Trainings

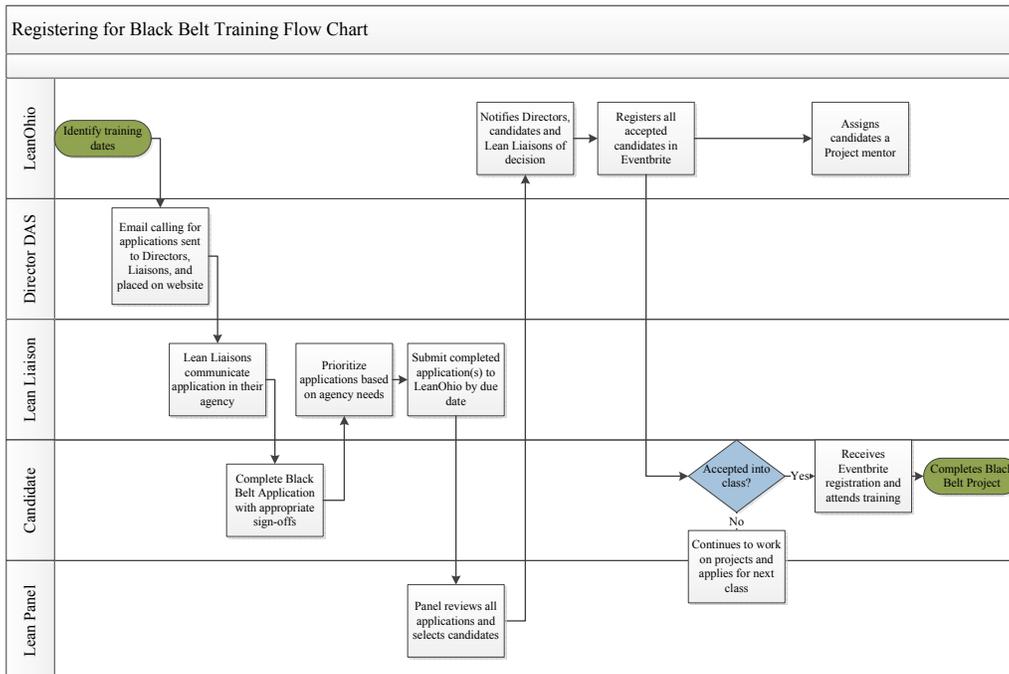


Registering for Green Belt Training Narrative: Green Belt uses an application to choose candidates. An email communication from LeanOhio will be sent to Lean Liaisons formally calling for applications. Applicants will have a designated time to complete the application. Candidates will complete the application with the appropriate signatures. The Lean Liaison will prioritize their agency candidates based on agency and leadership needs and submit to LeanOhio.

A LeanOhio panel then reviews each application based on several criteria and makes the selections for that class. LeanOhio then notifies all applicants and the Lean Liaisons of the decisions. All accepted applicants are registered in Eventbrite by LeanOhio.

LeanOhio highly recommends a candidate complete Camo Belt and a Camo Belt project (demonstrate a tool to make a process better) prior to applying for Green Belt Training. These items are part of the selection criteria that the panel uses to select Green Belt Candidates.

Registering for Black Belt Trainings



Registering for Black Belt Training Narrative: Black Belt uses an application to choose candidates. Black Belt is held once a year. An email communication from Director Blair, DAS will be sent to the Cabinet Level Directors and the Lean Liaisons formally calling for applications. Applicants will have a designated time to complete the application. Candidates will complete the application with the appropriate signatures. The Lean Liaison will prioritize their agency candidates based on agency and leadership needs and submit to LeanOhio. A panel of government Lean Six Sigma experts will review each application based on several criteria and make selections for that class. LeanOhio then notifies Directors, Applicants and Lean Liaisons of the decisions. All accepted applicants are registered in Eventbrite by LeanOhio. LeanOhio highly recommends a candidate complete Green Belt training and a Green Belt project prior to applying for Black Belt training. These items are part of the selection criteria that the panel uses to select Black Belt Candidates.

TYPES OF PROJECTS



Kaizen Events

In a typical Kaizen event, team members meet for five straight days to overhaul a core work process. Their week begins with just-in-time training in the Kaizen methodology. Then they map out the current state of the process, analyzing every step to find all forms of waste: overprocessing, delays, loopbacks, handoffs, excessive inventory, defects, and so on. They use their findings to develop a new process that is simpler, faster, better, and more cost-effective. Action plans address all aspects of implementation, including training and communication.



Value Stream Mapping

Value stream mapping helps visualize and resolve disconnects, redundancies, and gaps in your value delivery system. More than merely a tool to eliminate operational waste, value stream mapping is a highly effective means to transform leadership thinking, define strategy and priorities, and create customer-centric work flow



Strategic Planning

Organization to develop its direction and allocate resources to support that direction



Lean Routine

Lean Routine is taking elements employed in a Kaizen and/or other Lean Tools and using them on smaller sub-processes



DMAIC

Define, Measure, Analyze, Improve and Control: is a structured problem-solving method where each phase builds on the previous one, with the goal of long term solutions. These projects are data driven and are often used when process is in control/stable but needs further improvement.



3P: Production Preparation Process

Methodology used to create a new process.



Process Improvement Scorecard

Lean Liaisons are expected to report process improvements to LeanOhio using the Scorecard and encourage all trained in their agency to continue to report any process improvements. The Scorecard is found online at the LeanOhio website. Periodically LeanOhio will send out reminders to Lean Liaisons to submit process improvements (all belt projects are submitted here). All submitted information is compiled twice a year and shared with all of the agencies, Lean Liaisons, and the Governor.

Use this scorecard to:

- Report recently completed process-improvement projects
- Report projects that were done some time ago and are now generating results
- Provide updates on projects that you've previously reported

No need to fill in all the fields of information. Fill in the fields that apply, and upload any available files.

The scorecard can be found here: leanohionetwork.org/scorecard



Entrepreneur in Residence

Since September 2015, three executives from small business have been participating in the Entrepreneur-in-Residence Program (EIR). Led by the LeanOhio office, the pilot program aims to strengthen the connection between small business and state government.

During their year-long participation in the program, EIRs and their businesses gain experience and tools from leaders in process improvement. The state gains insights into private-sector best practices and challenges -- while learning ways to make government more responsive to the needs of small business. For more information please visit lean.ohio.gov/eir



Lean Local Initiative

The Local Government Efficiency Program is all about making local government simpler, faster, better, and less costly. The program includes grants and scholarships for Ohio cities, townships, counties, school districts, and other governmental agencies and organizations. It provides crucial support to increase efficiency, cut red tape, improve service, and save money.

With Process Improvement Grants, Ohio's local governments can learn and use Lean Six Sigma to improve key processes. The maximum grant available per project is \$100,000 regardless of the number of entities participating in the project. With Scholarships, leaders or staff of local government can attend the one-week LeanOhio Boot Camp/Camo Belt Training.

The Ohio Development Services Agency is partnering with the Department of Administrative Services to develop and manage the program. Click here for more information: lean.ohio.gov/local



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lean.ohio.gov/Services/MeettheLeanOhioTeam

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LEANOhio

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