



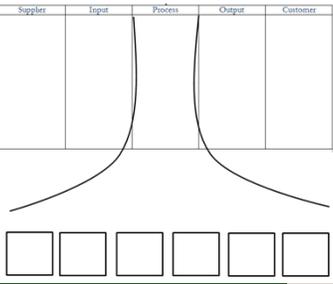
LEAN Ohio
BOOT CAMP

Scoping / Charter
Day 2: Module 1

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Review Day One

Supplier	Input	Process	Output	Customer

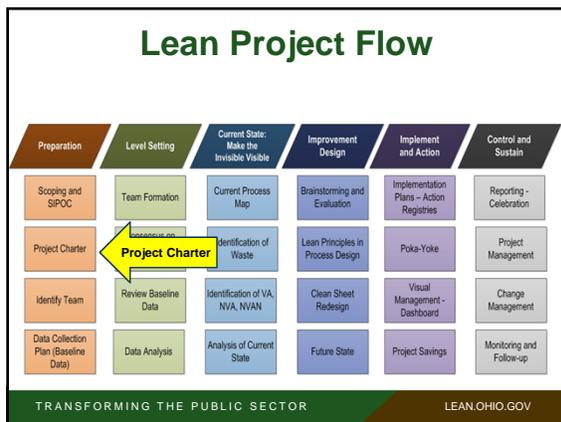


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Day 2 Objectives

- Complete a Project Charter
- Identify Metrics and collect data
- Develop operational definitions
- Map a simple process
- Identify Waste and Value Add Activities
- Interpret the Process Map

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Project Charter

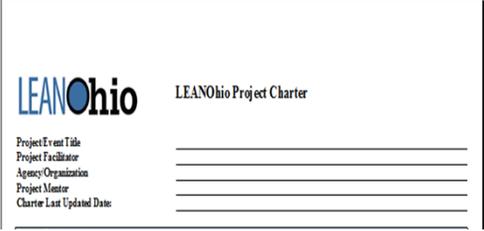
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Why Charter?

- Document and approve projects
- Scope of authority
- Creates common understanding
- Monitoring
- "Living" document

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Project Contact Information



LEANOhio LEANOhio Project Charter

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

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Project Background	<h2 style="margin: 0;">Project Background and Opportunity</h2>
Problem/Opportunity Statement	
SCOPE (DEFINE BOUNDARIES)	First step in the process: _____
	Last step in the process: _____
Project Goals	
Project Boundaries	

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Project Background

- Project Background
 - Short description of the process to be improved
 - What has been happening and the context of the project

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Problem/Opportunity Statement

- Problem/Opportunity Statement
 - Detail the issue
 - Historical data
 - How long problem has existed
 - Other Symptoms

Do not include a solution or state course of action in Problem/Opportunity Statement

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Problem/Opportunity Statement Questions

- What is the reason we are working on this project?
- When does the problem occur?
- How often?
- What is the current (or potential) impact

Always related to why customer expectations are not being met.

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Effective Problem/Opportunity Statements

- Concise and Specific
- Jargon-Free
- Written for management
- Quantify the magnitude of the problem
- Identify the process and current performance
- Include how customer is affected, data, and time frame (if available)

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Problem/Opportunity Statements

Be like Nike



If you already know the solution,
then Just Do It!

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Problem Opportunity Statement Example

Statement:
Eliminate data quality errors in the
“application review through grant award”
timeframe

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Example

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

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Example

Improved Statement:

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

Problem (points to "increased by 40%")

Quantified (points to "75%")

Impact (points to "prevents the department from complying...")

Customer Focus (points to "customers/providers")

Critical Output (points to "10 business days")

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Project Background

Problem/Opportunity Statement

SCOPE (DEFINE BOUNDARIES)

First step in the process:

Last step in the process:

Project Goals

Project Boundaries

Process Scope, Project Goals and Boundaries

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Process Scope

- Scope is the Boundaries of the process:
 - First Step in the Process
 - Last Step in the Process
 - From your SIPOC

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Project Scope-Creep

Scope creep:
uncontrolled changes or continuous growth in a project's scope

- Be specific
- Touchstone



Don't Boil the Ocean:
large problems may
require several projects

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Avoid Sub-Optimization

Sub-Optimization is improving one process at the expense of another

- Improvement projects are interrelated with other processes
- Only sub-optimize if agreed upon
- Communication

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Goals

- Intended outcomes of the project
- Related to Problem and Defect Definition
- What will be Achieved
- Sets targets - deliverables
- Criteria to know if project was successful

A carefully developed goal statement is critical to project success.

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Project Boundaries

- Limits on scope of process change allowable as defined by the team sponsor, legal restrictions, budget, etc.
- What the team has authority to do

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Event Out of Scope

- No one loses their job because of the Lean event, but duties may be modified
- No additional staff
- No additional money
- No legislative changes or changes to collective bargaining agreements
- No IT solution until it is determined that an IT solution is needed
- Other?

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Project Metrics, Benefits, Team Members, Sign-off

Performance Metric: What measures will tell you if you are successful?	Performance Metrics			
	Current	Goal	Find	% 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 team's improvements.				
Sponsor Signature: _____				
Process Owner: _____				

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Performance Metrics

What measures will tell you that your project is successful?

- Establish the process's baseline
- Allow a comparison to the target or goal
- Drive project decisions

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Projected Benefits

- Financial Benefits
- Intangible Benefits




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Project Team

- Team Champion/Sponsor
- Team Lead
- Process Owner
- Team Members
- Subject Matter Experts (SMES)
- Fresh perspective
- Customer

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Sign-off/Approval

- Project Champion/Sponsor Sign-off
- Process Owner Sign-Off

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Questions on Scoping / Charter?

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Group Exercise

- In groups complete a project charter for DOP
- Feel free to ask your sponsor any questions (including project boundaries)
- Once of your team has completed your project charter – review the charter with your sponsor and receive their sign off

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