

LEANOhio Newsletter

January 2019

Welcome to the first issue of 2019! The January edition spotlights a couple of different types of process improvement projects happening in state government.

The first project spotlight is a recent Green Belt project by Andy White, Policy Analysis Administrator, at the Ohio Department of Mental Health and Addiction Services (MHAS). Andy is the first employee in Ohio to complete [LeanOhio Online Green Belt Training](#) through [Learning On Demand \(LOD\)](#) and also complete and report out on his Green Belt project. Read further to learn how Andy applied the Define, Measure, Analyze, Improve and Control (DMAIC) model to improve the process for reporting key operational performance indicators for the state hospital system.

This issue also introduces a new service that LeanOhio will be offering in the very near future and was briefly mentioned in the December newsletter. Strategy Deployment, also known as Hoshin Kanri, is a planning and management method that strives to move organizations forward and ensure that key strategic directions and goals are clearly communicated to everyone. During this process, leaders work collaboratively to identify priorities to focus on for the coming year that will help advance their long-term strategic plan. This makes it possible to align goals and objectives for every department, team and person with the long-term aims of the organization.

And lastly, thanks to everyone that took time to complete our voice of the customer survey in last month's newsletter. We received some great feedback and will continue to provide the newsletter on a monthly basis. Based on the feedback we will be including more of a variety of projects from around the state.

As a reminder, past newsletters can be found [here](#) and if you have an article or idea you would like to see highlighted – send to michael.t.buerger@das.ohio.gov.

Project Spotlight – Andy White, Department of Mental Health and Addiction Services



As a part of the Office of Hospital Services at the Ohio Department of Mental Health and Addiction Services, I work on a team that manages six inpatient psychiatric hospitals across the state. These six hospitals serve as a critical safety-net for patients unable to be treated elsewhere. As a Department, we must effectively manage our resources in order to best serve our patients and the communities in which they live. To that end, my project focused on improving the process for reporting key operational performance indicators for the state hospital system, including budgeting, spending, revenue, staffing, and specialized clinical staffing.

The Department's existing operational reporting process provided several opportunities for improvement. Budgets were based on legacy Cost Accounting Standards (CAS) accounting system language which required heavily-coded reports to convert Ohio Administrative Knowledge System (OAKS) actuals into CAS language. Every two weeks, these CAS-based reports were manually aligned with budget numbers in Microsoft Excel and emailed to state hospital leadership. This process took on average 4 days to complete, at which point the data was already 16 days out-of-date. Outside of these budget reports were additional operational reports on revenue, staffing, and specialized clinical staffing. All these reports were separate from each other and had to be manually created in Microsoft Excel. These various processes and factors made it difficult for state hospital leadership to get an accurate, comprehensive, timely, and useful overview of their hospital resources.

In order to improve, we needed to start over. Budgets were updated from CAS to OAKS language; actuals reports were reduced from 14 to 4; all manually-created Microsoft Excel spreadsheets were eliminated; and all budgeting, spending, revenue, staffing, and specialized clinical staffing reports were integrated into a single Tableau dashboard with data refreshed daily from OAKS. This new reporting process has provided state hospital leadership with access to a single source of key operational performance indicators to better manage their hospital resources. Questions that used to take weeks to answer, such as, "How much contract budget do I have left?" or, "How many psychologists have I had over the last 3 years?" or, "What percentage of my staff is administrative and what percentage is clinical?" can all be answered with a click of a button. This new process has allowed state hospital leadership to spend less time figuring out what their resources are and more time managing those resources effectively.

5S approach applied to the data and the dashboard:

	DATA	DASHBOARD
SORT	<ul style="list-style-type: none"> Evaluated existing OAKS BI Standard Report for use actuals datasets Identified reports that were useful Restructured reports in OAKS as needed Aligned external budget dataset structure with structure of new actuals dataset from OAKS 	<ul style="list-style-type: none"> Using merged datasets in Tableau, developed multiple visualizations and data tables for consideration Deleted what was unnecessary/confusing and kept the rest
STRAIGHTEN	<ul style="list-style-type: none"> Technical merger of actuals datasets from OAKS and external budget datasets in Tableau 	<ul style="list-style-type: none"> Categorized remaining visualizations based on type Created the Dashboard structure Developed navigation and drill-downs throughout entire Dashboard
SCRUB	<ul style="list-style-type: none"> Aligned merged dataset with chartfield crosswalk to make data easier to understand and utilize Confirmed accuracy of merged data against actual datasets 	<ul style="list-style-type: none"> Tested that all navigation and drill-downs worked appropriately Cleaned up formatting and visualizations
STANDARDIZE	<ul style="list-style-type: none"> Scheduled actuals datasets to refresh every morning at 6:00 am 	<ul style="list-style-type: none"> Ensured that Dashboard refreshes were limited to just the datasets and not the Dashboard structure
SUSTAIN	<ul style="list-style-type: none"> Upload refreshed actuals datasets every morning to the Tableau Dashboard and publish for viewing 	<ul style="list-style-type: none"> Upload refreshed actuals datasets every morning to the Tableau Dashboard and publish for viewing

Although this project took a significant amount of work and required multiple layers of data modeling, integration, and simplification, applying a DMAIC framework made it much easier to approach. Defining our existing processes, measuring them for inefficiencies, analyzing root causes, improving our processes, and controlling these improvements has provided state hospital leadership and the Department with a way to more efficiently manage our resources and ensure that the patients and communities we serve get the critical treatment services they need.

Click [here](#) to view Andy’s Green Belt PowerPoint presentation.

Strategy Deployment – Scot Burbacher, LeanOhio



As many agencies throughout the state continue in their Lean journeys and have been successfully advancing the maturity of their Lean implementations, a challenge for us at LeanOhio has been to find new ways to continue to support that maturity growth through the services we offer and the trainings we provide. To that end, we’re excited to share with you some details about a new tool we’ve been working on.

Strategy Deployment (sometimes referred to as Hoshin Kanri, Hoshin Planning, or Policy Deployment) is a focused, engaging methodology for enabling organizations to prioritize, mobilize, and realize their overarching business strategy. It provides leaders with a mechanism for deciding which priorities truly matter right now, and it creates

a linkage between continuous improvement initiatives and the organization's strategic goals – a critical component to ensuring support and sustainment of any Lean initiative. Strategy Deployment, when successfully utilized, aligns *everyone* within the organization to its 'True North' priorities and empowers even frontline employees with the understanding of how their day-to-day work contributes directly to the mission of the organization.

As we prepare to make this tool available in the coming months, we encourage you to stay tuned to the newsletter and other communication channels for additional information. We also encourage you to dive into some external resources on the topic ahead of our rollout. Industry-leading consultant and award-winning author Karen Martin (one of our go-to resources on all things Lean) has shared her experience and knowledge on the subject through a series of webinars and with her recent book *Clarity First*, all of which helped make up the informational scaffolding upon which our Strategy Deployment model has been built. Her pre-recorded webinars can be found at <https://tkmg.com/webinars/strategy-deployment/>, and more information on her book *Clarity First* can be found at <https://tkmg.com/books/clarity-first/>.

Lean in the News – Sara Molski, Department of Higher Education

How Lean Rolls Its Way Into the Sushi Biz

One might think that all aspects of Japanese culture are Lean influenced, given the country is famous for launching the methodology. Yet, as Lean Six Sigma consultant and practitioner Katie Anderson notes, this is not always the case. Therefore, Anderson was excited when she stumbled upon one restaurant in Japan, Kura Sushi, which imbeds Lean into all aspects of their operation. Read on to see how this restaurant uses common Lean principles in serving up its sushi.

Visual controls and 5S principles: There is a color-coded map hanging in each aisle with corresponding numbers and colors representing each table. There is also a numbered and colored sign on each table.

When your table is ready, you are given a color-coded card with a number that matches the colors and numbers on the map hanging on the wall. This allows customers to easily find seating. Each table has a standardized set up, and there is a process to replenish cups, plates, and other items.



Mix of “pull” and “push”: There are no need for servers at Kura Sushi. Customers order their food via a “pull” system by using a computer to enter their food request. This allows customers to browse through computer screen photos of the different food and drink options. The computer system assists in managing work production by limiting the amount of new orders the system will accept. If the kitchen is slammed, the system will alert you with a message to “wait” until the kitchen has the capacity to process your order.

When your food is ready, it is zipped out on a conveyor belt right to your table accompanied by gaming music. There are actually two conveyor belts circulating the restaurant – an upper and then lower belt. The upper conveyor belt is designed specifically for customer-placed orders. This conveyor belt delivers your food directly to your table to ensure no one mistakenly takes it (which utilizes another Lean Six Sigma tool – Poka-Yoke, or mistake-proofing). The lower conveyor belt is for pre-made food. This is typical at sushi boat restaurants in which you select prepared plates off the conveyor belt as opposed to ordering a specific dish. Anderson notes that the restaurant has the flexibility to shorten the conveyor belt route if fewer customers are in the restaurant by shortening the distance the food travels with these movable plastic guiders.

The Japanese company analyzes customer demand by studying data from bar codes on the deposited plates to understand common customer usage and to plan for how much of each plate to pre-make. The computer system also helps manage waste by ensuring the kitchen only produces food that has been requested. When you are finished, you deposit your plate down a shoot at your table. The plate is then counted via the bar code to be added to your bill.



To read Katie Anderson’s blog about Kura Sushi’s operation and approach, visit the following [website](#).

Featured Tool

– Loretta Medved, Ohio Department of Insurance



Action Register

An Action Register is a simple Lean concept that is part of your day more than you may realize. Who? What? When? Questions we ask ourselves many times throughout a day. Map these answers out visually and you may be surprised how much more effective your week can be.

The Action Register tool defines visually the assignments that need to be completed; this is crucial for meeting follow-up and maintaining accountability for the ideas and decisions made by your group. A simple 3-column chart displayed centrally in your workspace (such as near the water cooler for instance) visually reminds everyone to complete their tasks by the deadline.

Who? Assign an owner as the person(s) responsible for completion of the task.

What? Define the task or assignment that is to be completed.

When? Set a date for when the action is to be completed.

NEXT STEPS		
WHO ☺	WHAT ☑	WHEN
Bunko	=====	5/10
Morelli	=====	Friday
Chung	=====	1/07
Macannfo	=====	Mon. 9am
Brown	=====	NOW!!
Gray	=====	Friday

Action Registers may also include a fourth “comment” column. The “comment” column may contain important notes that explain oddities such as why a task was not completed on time, is no longer required, or was reassigned.

Studies support posting Action Registers in prominent locations mainly because it promotes transparency, improves motivation, and builds teamwork.

Upcoming Events

[ODRC Kaizen Event](#) – January 14 – 18, 2019

[OSU COE Event](#) – January 18, 2019

[LeanOhio Belt Presentations](#) – January 23, 2019

[Lean Liaison Meeting](#) – January 23, 2019



“Lean education and culture continue to pay forward – a gift that keeps on giving.”

-- Vanitha Zacharias, *Ohio Department of Administrative Services*



The LeanOhio Newsletter is published by the Department of Administrative Services, LeanOhio Office.



Ideas or feedback? Please send to: leanohio@das.ohio.gov