Training Update

Boot Camp January 2020

Congrats to our January 2020 Boot Camp cohort. 23 attendees from 11 different agencies completed LeanOhio Boot Camp training last month. These newest members of the LeanOhio Network are now equipped to use their skills immediately to properly identify process improvement opportunities within their agency, identify causes of waste and simplify processes.

Front Row, Left to Right: Cynthia Anderson (MED), Taylor Vonderhaar (DRC), Amanda Rollins (PUCO), Daneiaka Howard (PUCO), Tim Stanek (PUCO), David Hamilton (DRC)

Middle Row, Left to Right: Amy Studebaker (DRC), Normy Fehrman (DODD), Kelli King (PUCO), Leanne Skeen (DYS), Kathleen Koechlin (ODH), Rachel Blick (DODD), Anne Marie Dennison (ODJFS), Melissa Wolfe (MED), Emily Cook (DODD)

Back Row, Left to Right: Phillip Calloway (PUCO), Chad Hibbs (OHMHAS), Shaun Martin (DRC), Anne Chernauskas (DAS), Laura Sullivan (EPA), Anthony Cox (MED), Eric St Germain (ODH), Pete Whitehouse (EPA)

Project Spotlight

Department of Taxation Project

The Department of Taxation (ODT) had a problem- it's process for reviewing income tax refund applications (IT ARs) had become inefficient and full of waste. Waste existed in nearly every phase of the process and the following topline statistics were emblematic of those inefficiencies:

- The number of employees used to process each IT AR (15)

- The number of databases used to log information (11)

- The need to transport IT ARs between ODT's two office locations

- A confusing refund application that contributed to the actual review process taking up to **two-hours**

It's no surprise to anyone that when taxpayers file refund applications with ODT, they want their refund application processed yesterday. That's why when **ODT attorneys Matt Dodovich, Kyra Horvath, and Andrew Winkel** were looking for a Camo Belt project, they jumped at the chance to examine every facet of the IT AR process from start to finish. With support and sponsorship from the front office and both of ODT's Legal and Operating Divisions, they created a project charter for "PIT RAPS" (the **P**ersonal **I**ncome **T**ax **R**efund **A**ppeal **P**rocess **S**treamlining project). The goal was simple- to make ODT's process for reviewing and resolving IT ARs more efficient and effective by streamlining and standardizing the workflow.

The project facilitators assembled a team consisting of employees from each of the seven divisions that played some part in the processing of IT ARs, introduced them to basic Lean concepts and methods, and put the LeanOhio suite of tools to work. The team met six times over a two-month span to study the problem and determine its root causes. Of note, the team:

- Mapped the current IT AR process and identified waste

- Used silent brainstorming to come up with ideas to improve the process

- Placed those ideas in an impact control matrix to evaluate the feasibility of implementation

- Performed a "clean sheet" redesign of the IT AR process

- Used the Poka-Yoke technique to improve the physical refund application

The end result was a reduction in the number of employees needed to completely process an IT AR from 15 to 10, a reduction in the number of databases used to track the IT ARs from 11 to 4, digital transfer and archival of IT ARs to cut down on delivery time and storage space, and a redesign of the IT AR to make it more intuitive for taxpayers and more reviewable for ODT staff.

The updated processes were officially implemented in September 2019. Since implementation, the affected divisions have reported reduced handling times and smoother transitions. Because of its short-term successes, other operating divisions within ODT are already inquiring about the portability of the process improvement to their areas. The team continues to evaluate the new process, and, if it continues to function well, several of the new and improved features may be applied to ODT's billing and assessment processes. On the flip side, if there are some hiccups in the process, the team will reevaluate the trouble spots and look for ways to continuously improve the new process prior to porting the model to other areas.

Network Opportunity

OSU COE Summit

The Ohio State University, Fisher College of Business, Center for Operational Excellence (COE) is a business consortium founded more than 25 years ago that connects organizations of all industries on their journeys to build and sustain a culture of problem solving and continuous improvement.

The pace of change is moving faster than ever, and organizations are becoming defined by their ability to adapt and anticipate disruption. Growing as an innovative, adaptive organization means supporting a culture of continuous learning - and each year, The Ohio State University Center for Operational Excellence offers an opportunity to get your cross-functional teams offsite and in front of the latest best practices in leadership and problem solving. Join other COE members, and 500 process excellence leaders from across North America, for the Leading Through Excellence Summit on April 7-9, 2020 at the Fawcett Center.

Click here to learn more about this year's keynote speakers, breakout sessions, and pricing.

Upcoming Events

LeanOhio – Managing Change: February 13, 2020

LeanOhio Boot Camp: February 24 – 27, 2020

Open House: March 5, 2020

LeanOhio Boot Camp: March 16 – 19, 2020

Network Belt Presentations and Lean Liaison Meeting:
March 26, 2020

Leading Through Excellence - OSU COE Summit: April 7 – 9, 2020

LeanOhio Boot Camp: April 20 – 23, 2020

Are you interested in working on the LeanOhio Newsletter? We want to invite you to join us! Whether you are good at writing, editing, or just have some great article ideas, we would love to have your help. Please email us at LeanOhio@das.ohio.gov so we can talk about your interests and invite you to our next meeting.

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

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Mike DeWine, Governor
Jon Husted, Lt. Governor
Matt Damschroder, Director

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