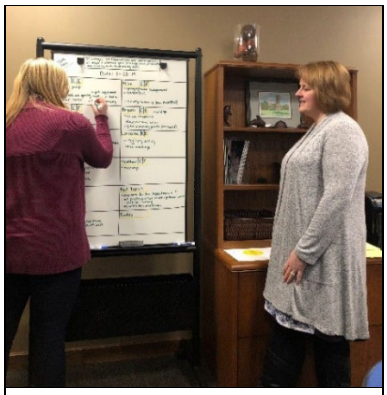
Michigan Tech

Continuous Improvement Using Lean Principles

April 2019 Update

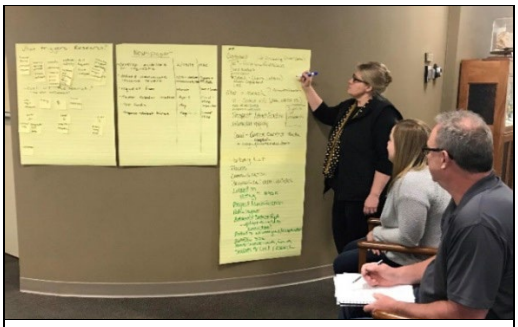
The Office of Gift Planning and Advancement Services Leverages Lean

The Office of Gift Planning and Advancement Services (OGP/AS) has implemented several Lean improvements. They started a morning huddle in December 2018, with all staff and the Office of Advancement Operations Manager attending daily. The 5- to 15-minute huddle provides opportunities to share the day's primary focus, collaborate on issues, and discuss educational topics and leadership updates. Since the huddle started, they have been able to shorten the time needed for their weekly meetings, because updates and issues are dealt with daily. There are also fewer interruptions during the work day, since they know they will connect with colleagues during the huddle. Once each week, a staff member provides education on a customer service or continuous improvement topic. Photos of the information recorded on their daily huddle board are shared on their Slack #huddle channel for those who are unable to attend. Slack is an online team collaboration tool.



Timely information is shared and team bonds are strengthened at a daily huddle

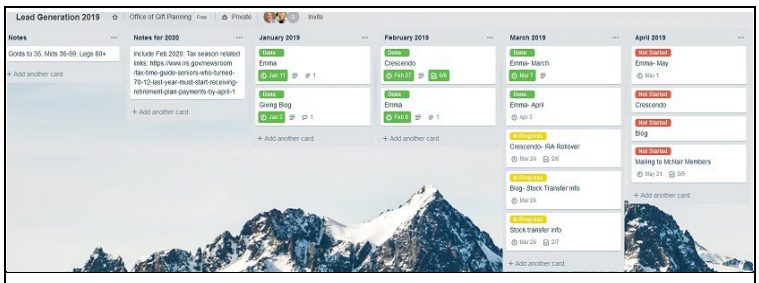
Continuous improvement has been incorporated into the OGP/AS weekly staff meeting as a standing agenda item. This time is used to discuss active continuous improvement projects (see below) or to provide education on Lean tools and culture. A second Slack channel was added specifically for discussing Lean projects.



Value stream maps make office processes visible, enabling everyone to see current state and collaboratively improve the process.

OGP/AS is working on several value stream mapping (VSM) projects. Their *Proposals* mapping event was held in December; one of the action items changed the process name from *Proposals* to *Illustrations*. The new process, which provides guidelines and a form for front-line fundraisers to request illustrations in support of donor proposals, is in the testing phase. The final process is expected to be rolled out in April. In addition, a *Research* improvement event was held in February. The new process includes guidelines and a form for front line fundraisers and departments to request research on prospective donors. It is being finalized and will be presented soon. A *List Request* improvement event is scheduled for April, with the goal of developing a process for departments to request contact lists of alums and friends for events and mailings. Additional VSM events will be scheduled for *Reporting*, *Planned Gifts* and *Lead Generation*. As a result of these improvements, OGP/AS responses will be faster, their customer's experience will improve, and capacity savings will enable staff to spend more time on value-added efforts.

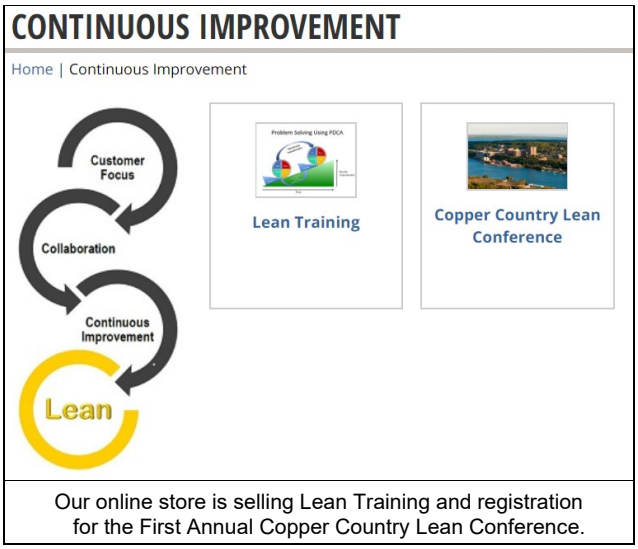
Knowledge folders are being created to document existing processes and procedures and ensure new ones are documented prior to implementation. This will prevent institutional knowledge from being lost due to attrition and ensure that different people performing the same task use the same processes and procedures. Creating standards also provides a basis for continuous improvement.



Trello was used to create an electronic kanban.

An electronic Kanban board was created and is being used to manage the Lead Generation process. A kanban board is a work and workflow visualization tool. It is being used to record, track, analyze and archive the methods used for Lead Generation each month. Multiple people are able to use the same board, and it can be accessed from any personal computer, tablet, or smartphone. This is especially useful for staff members who travel.

Lean Outreach and Connections



Our online store is selling Lean Training and registration for the First Annual Copper Country Lean Conference.

- **Office of Continuous Improvement (OCI) Provides Training for Lean Community.** Beginning in March of this year, OCI is offering Lean training to the local community at very reasonable rates. The goal is to expand the use of Lean in the region, which will contribute to the overall economic health of our area. The training includes sessions on the different aspects of the Plan-Do-Check-Act cycle and practical workshops on workplace organization, process mapping, and visual management. In addition, OCI is hosting the First Annual Copper Country Lean Conference on May 20. Registration can be completed through our online store.
- **Archer Presented at HuskyLead Workshop.** Dr. Ruth Archer, OCI director, delivered an active learning session on improving leadership through perceptual engineering at a recent HuskyLead session. HuskyLead is a leadership development series for Michigan Tech students.
- **OCI is Founding Member of Lean in Academia Community of Practice (LiA CoP)**. OCI was invited to participate as a founding member in the Michigan Lean Consortium's (MLC's) LiA CoP. The purpose of this community is to enable the establishment and expansion of Lean thinking at Michigan higher education institutions. Representatives include faculty and staff from the University of Michigan, Michigan State University, Oakland University, Northwestern Michigan College, Grand Rapids Community College, Wayne State University, Eastern Michigan University, Grand Valley State University, and Western Michigan University. Michigan Tech holds a university-wide MLC membership available to faculty, staff, and students. If you would like access to the member-only benefits from the MLC, send an email to improvement@mtu.edu.

Andrew Miles, financial aid manager and Lean facilitator, leads a group through an introduction to process improvement.

- **Tech's Lean Training Capacity Expands.** OCI has developed a Train the Trainer program to expand its Lean training capacity. Current Lean facilitators receive training in experiential learning, adult learner characteristics, teaching methods, and classroom management, then apply their knowledge during an apprenticeship at a Lean training course. Facilitators with these enhanced skills are teaching the Michigan Tech Lean training, Lean facilitator training, and more recently provided outreach training to the Continuous Improvement Solutions Group in Dickinson County, Michigan.

Continuous Improvement Events as of March 25, 2019

Managed through OCI

President's Council Area	Active as of 25 Mar 19	Completed since last report 25 Jan – 25 Mar 19	Completed FY19 YTD 1 Jul – 25 Mar 19	Completed FY18 Full Year
Academic Affairs	4	0	2	5
Finance & Administration	4	1	2	13
Research	0	0	0	3
Advancement	0	2	3	2
University Relations & Enrollment	1	0	0	0
Total	9	3	7	23