Continuous Improvement Advocates

Round 14 | Fall 2024



1



CONTINUOUS IMPROVEMENT

Partnering with people, enhancing processes and empowering others to LEARN, IMPROVE, and LEAD.

Meet The CI Team

CI Management



Ben Thurgood

Innovation & Process Improvement



Davern

Matt Janzow

Hughes

Kaelynn Lorick

Learning & Development





Indira

Owen Robinson





Castillo Santiago



Cassandra

Zhu

Kiomars Qahir

Workforce Data, Finance & Analytics











Tammy Liddle Lobban

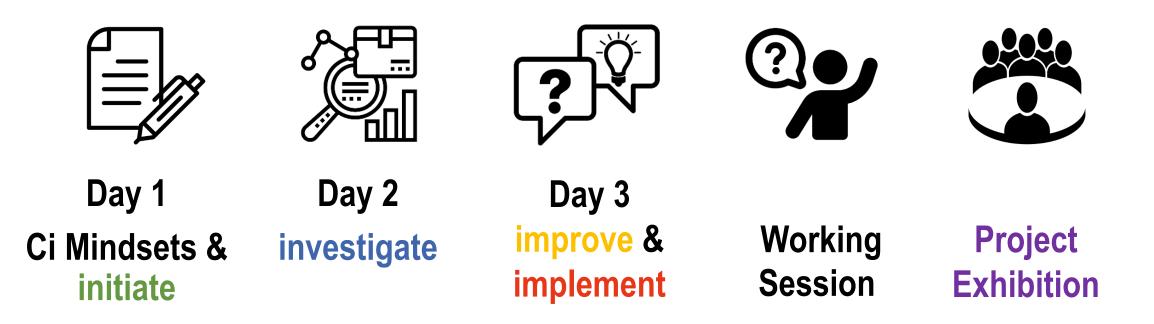
Megan Tan

Athena Meisenheimer

Kathy Emerson Nicole Ratliff

CI Advocates Program Structure

3 Sessions + 1 Working Session + Project Exhibition



Fall 2024 Schedule

DATE	TIME	DESCRIPTION
September 11, 2024	8:30a – 4:30p	Day 1: Introduction and CI Mindsets, Ci4i Framework, and initiate
October 02, 2024	8:30a – 4:30p	Day 2: investigate
November 06, 2024	8:30a – 4:30p	Day 3: improve + implement
November 20, 2024	8:30a – 10:30a	Working Session (optional)
December 04, 2024	9:30a – 12:00p	Project Exhibition

Outside of the Classroom

In addition to classroom learning:

Project Work Lead team meetings, complete project charter and practice Ci tools Office Hours Complete four office hour sessions, with assigned Ci Consultant (30 mins. each) Sponsor Check-ins Schedule time to meet with your project sponsor

Project Exhibition

What to expect...

Audience

• City Leaders attend, however the tone is an informal roundtable conversation

Deliverables

 Presentation + analog copies of your project charter and CI tools used

Prior Support

- Review work samples and connect with CI staff during office hours or via email
- Optional Working Session





Attend all sessions in full + present at Project Exhibition



Meet with your project team/sponsor and attend office hours



Complete and upload project deliverables





Look in upper right corner



Ask Questions or Share Ideas



Practice Your Skills



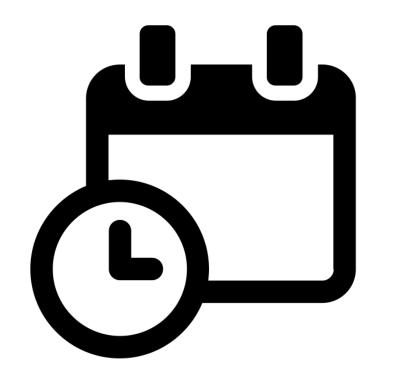
Dive Deep to Learn More



Review Case Study

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Agenda



Day 1

- ✓ Introductions + Ice Breaker
- ✓ Widgets and Factories
- ✓ CI Mindsets
- ✓ ci4i Framework
- ✓ Break for Lunch
- ✓ initiate
- ✓ Project Charter (Overview)
- ✓ Building the Project Charter
- ✓ Homework







Introductions

Share your name, department and a story about an embarrassing moment.

Bicycle Exercise



Practice solving a typical business problem.



As a team, you are assigned responsibility for the manufacturing of a Trek bicycle, the Procaliber. The product line is unprofitable, and you need to help turn it around. What would you want to know in order to increase sales and boost profits?

10 minutes to brainstorm in groups
Assign 1 recorder to report out
Use workbook to capture ideas
Report out (4-5 minutes)

Questions to Consider



How are the issues that businesses deal with different from government?



Do you have similar information about processes or programs in your workgroup?



If so, how do you use the information to manage your processes or programs? 3

Do you use similar data to judge the effectiveness of your processes or programs? "Government is a group of hard-working people trapped in dysfunctional systems producing invisible things for people who do not want them, on behalf of others that do, for reasons we can rarely articulate and hardly measure."

Ken Miller



3 Beliefs That Keep Government from Improving





We don't make widgets

What we do is hard to describe, squishy, and intangible.

We don't have customers



We have hostages— they didn't choose us, they don't want to come back, and it doesn't really matter if they are happy. Also, we have customers with competitive interests who can't agree on what they want vs. need.



We're not here to make a profit

Increased revenue or time savings are not reinvested in us as employees. There is no reward for making improvements.

3 Myths That Keep Government from Improving



We do make widgets Our process have tangible outcomes that can be improved.



We do have customers

Internal or external to the organization, there are direct recipients of the widgets our processes produce.



We are here to make an profit impact

Efficient use of resources allows us to generate more and better outcomes for the community.

Quick Break



What's a Widget?



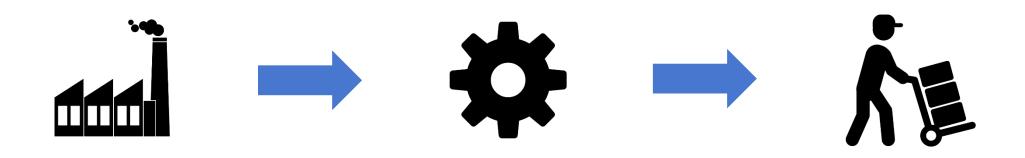
Widgets have 4 specific characteristics.



Why do Widgets Matter?



We produce <u>widgets</u> and deliver them directly to customers.



If we can't identify widgets, we can't identify the <u>factories</u> that need to improve.

How to Identify Widgets and Internal Factories



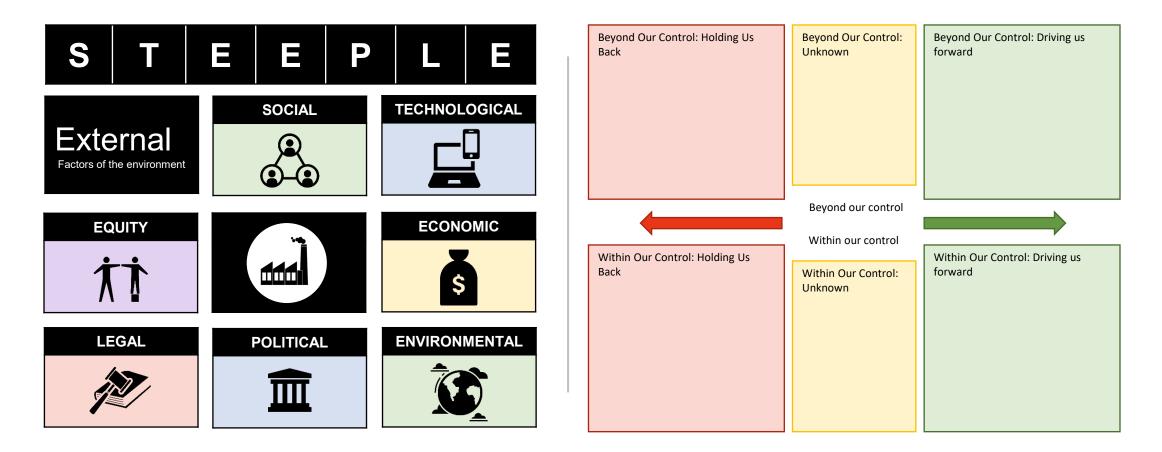
Share an example of a factory, a widget you produce and your customer.

Factory	Widget	Customer
What resources, partners, rules, and activities are involved?	How Many? At what cost?	What do they value? Timeliness? Ease of Use?
CI Innovation Team; Ci4i Framework; CI Consultants	CI Advocate Training Session (PPT, Workbook)	CI Advocates

Environmental Scan

STEEPLE

Environmental Scan



Curiosity

A core fundamental of Continuous Improvement is being curious.

Solving a problem is all about learning to see and dive deeper.

Curiosity

I don't know yet

This doesn't work yet

I don't understand yet

This doesn't make sense yet

I'm not good at this yet

I can't do this yet

...the power of "yet"

Continuous Improvement

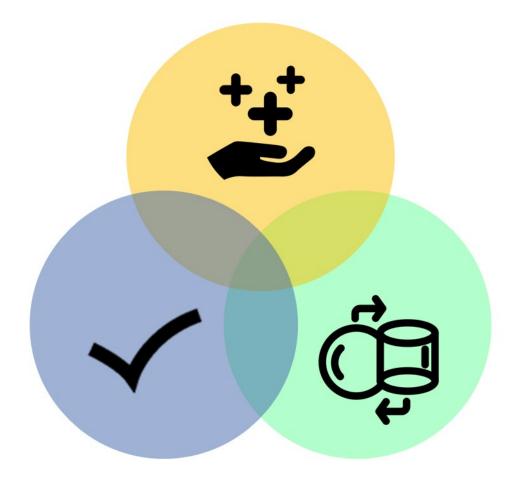
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Four Main Ci Mindsets



We're in the middle of making it better. Customer Slow down Systems, Processes, Not People not Silos defines value to go Fast ++

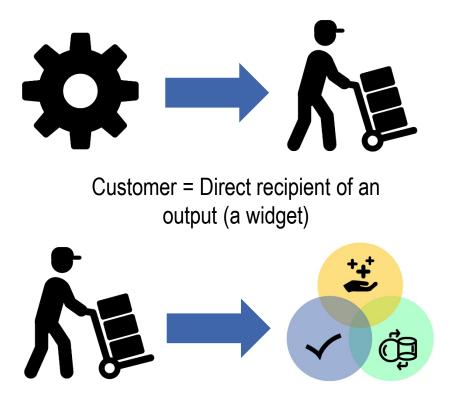
The Customer Defines Value, but how?



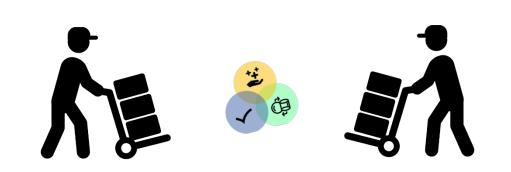
8 Wastes					
(A)	Waiting	$\gamma \sim$	Motion		
¢-0↓ C+Q	Over processing		Inventory		
	Overproduction	E.D	Transportation		
Carter Co.	Defects		Employee Skills (Unused)		

Customers vs. Stakeholders

Customers are a specific type of stakeholder:



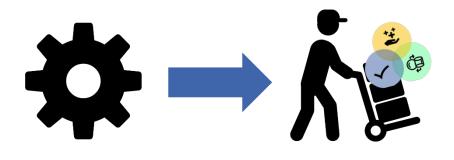
The <u>customer</u> determines whether or not a step adds value (YOU DON'T)

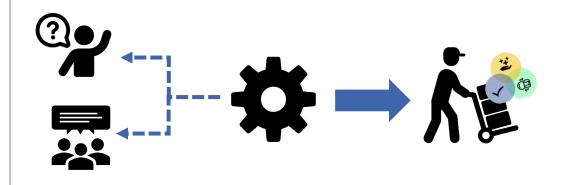


There can be distinct customer segments with competing interests

Customers vs. Stakeholders

Stakeholders are impacted by the outcome(s) of a widget:





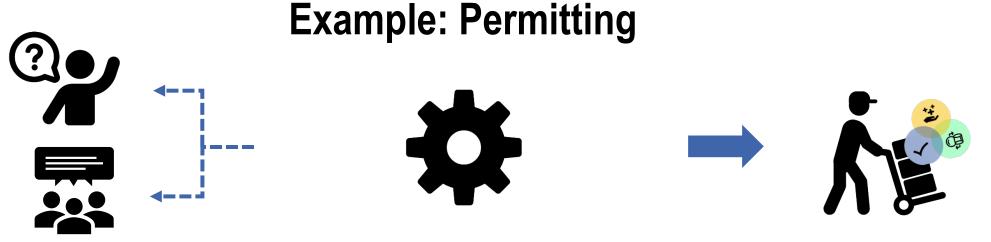
The <u>customer</u> is the direct <u>recipient of an</u> <u>output (widget)</u>

AND

They are **impacted by the outcome(s)** produced by the output (widget)

We must also consider the interests of <u>stakeholders</u> impacted by the <u>outcome</u> of the widget (who do not receive it directly)

Customers vs. Stakeholders

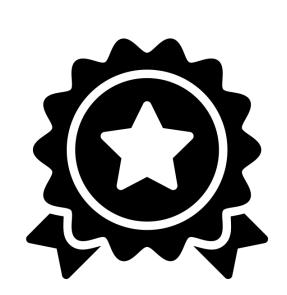


Stakeholders	Widget	Customer(s)
Who is impacted by the outcome?	Output of the product or service	Who directly receives the widget (output)?
Renters seeking multifamily housing Affordable Housing groups HOAs/neighbors	A housing permit	Multifamily Housing Contractor Single Family Homeowner

Ci Mindset: Slow Down to Go Fast

Slow and steady wins the race!



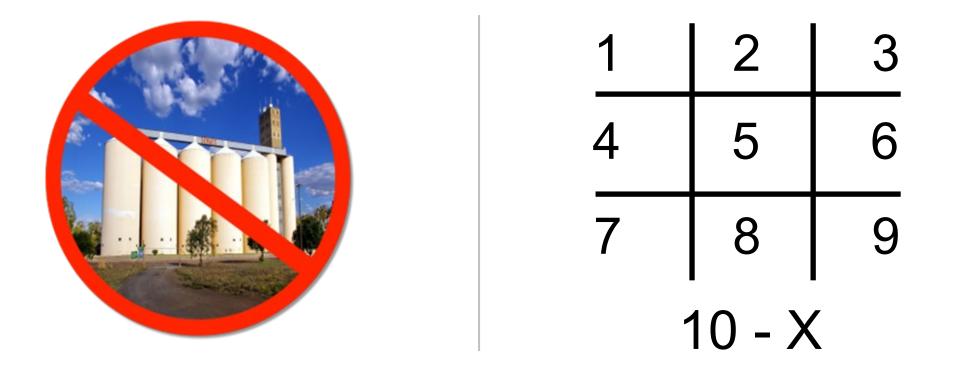




Systems Not Silos: Numbers and Symbols Exercise



You will be given 45 seconds to memorize symbols for the numbers 1 to 10.



Write down as many as you can!

Workbook Page: 9

Questions to Consider



What efforts could you make to discourage silo building?



In your work with the city, how have you made connections and worked with other functions to overcome silo thinking?



How could overcoming silo thinking lead to better outcomes in your work area? 3

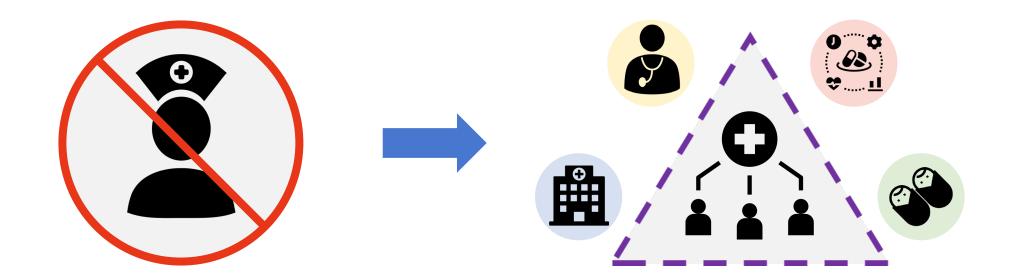
How might you avoid silo mentality throughout your improvement project?

Processes, not People

Ci Mindset: Processes, Not People

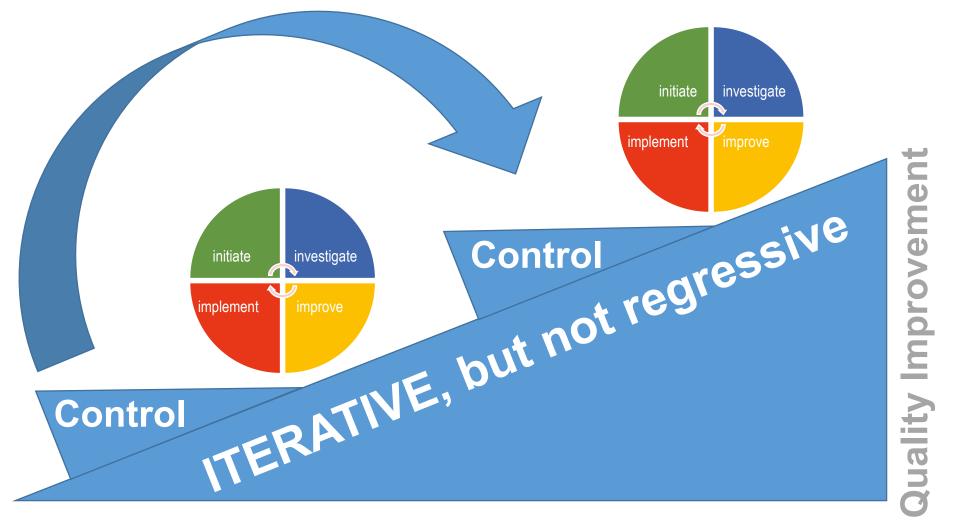


Remember: people respond to the <u>system</u> they work in.



Don't respond to problems by blaming people, let's improve the process first.

Continuous Improvement is...



Time

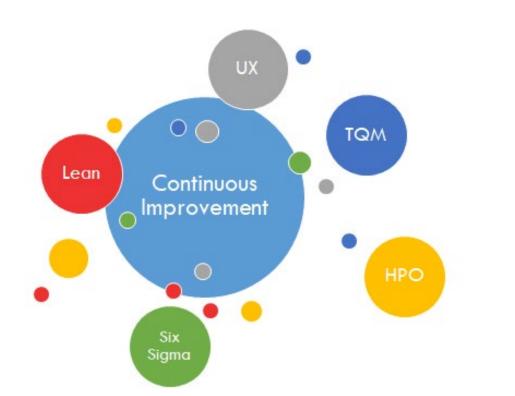
Continuous Improvement

Our Framework

What is ci4i?



You may have heard about...



ci4i is a four-phase process improvement framework

initiate investigate improve implement

4 Plain Language Phrases



initiate

investigate

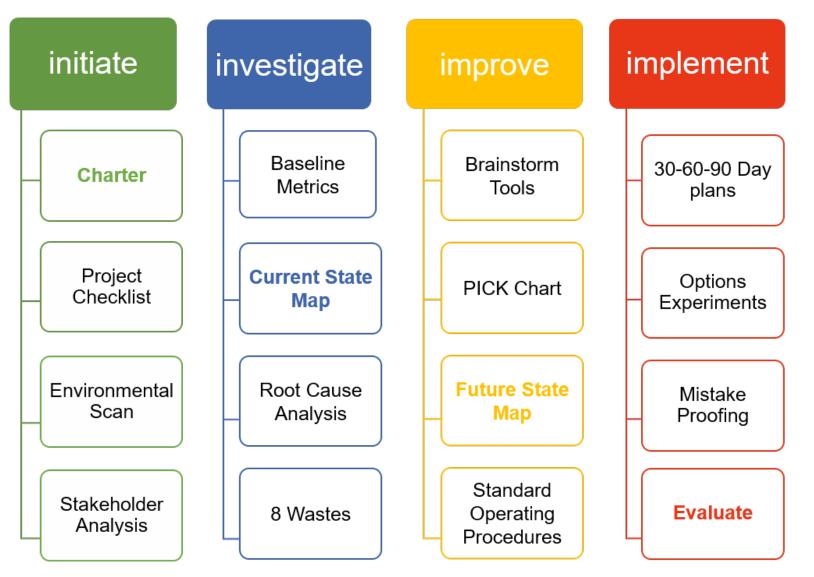
improve

implement

Consider the context Understand what <u>IS</u> Explore what <u>COULD</u> be Create what <u>WILL</u> be

iterate Do it all again

Ci4i Framework Tools



Lunch Break

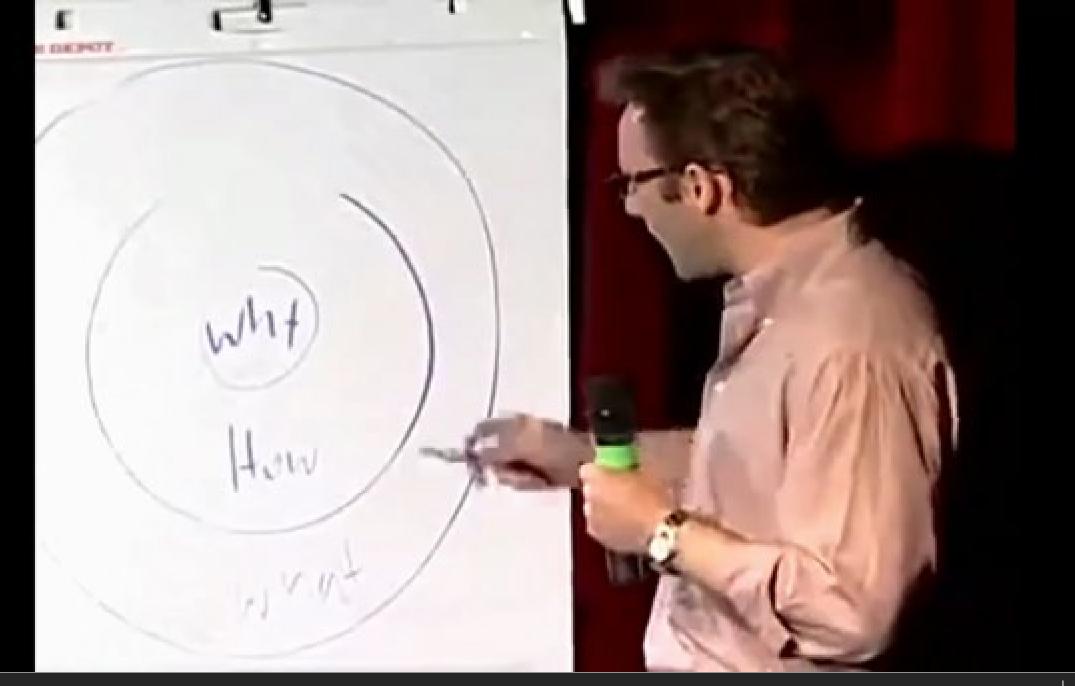




initiate | investigate | improve | implement

initiate: What is the goal?

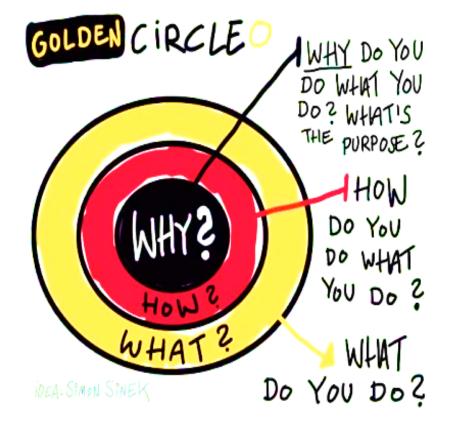
	GOAL	DELIVERABLES	ADDITIONAL TOOLS
initiate	 Define the problem Develop the charter Get leadership support Establish a project team 	 Project Charter Front Stakeholder Analysis Environmental Scan & STEEPLE 	 Start with Why (Golden Circle) SMART Goals/ HARD Goals (Targeted Outcomes)

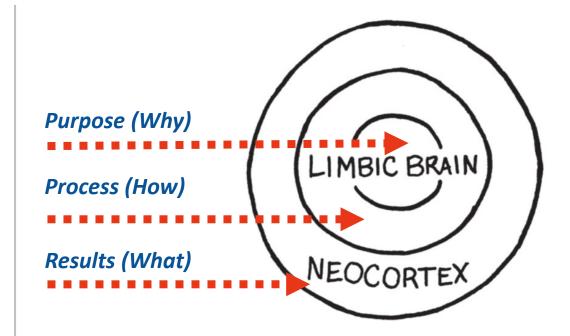


Start With Why



Tell us your single, salient sentence of why your project is critical.





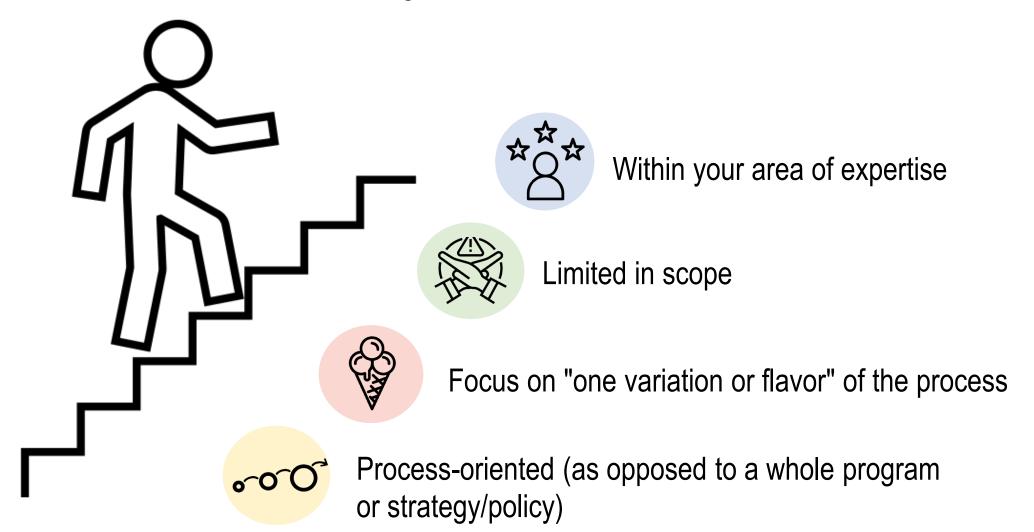
Project Charter Overview

Front



Date XX/XXXXXX Feam Sponsor: [Project Sponsor's Name] Team Lead: [Team Lead Name] Improvement Team: [List names here] Resources: [List names here] Stakeholders Customer: [The direct recipient of the output from this process. The single individual/category of individuals for whom we will design this process] Other Stakeholders: [List categories of stakeholders here]	question mark or solution in it, you're not done!] Scope [The scope should detail the start and end of the process. Process Start: Process End: Targeted Outcomes • [Use SMART goals where possible as targeted outcom • [A few of the goals can be more qualitative/long term/st Boundaries • [Be very selective of what you consider a boundary – q	npact; and who the customers are (who is impacted). A on, nor an un-actionable complaint. If your statement has a It can also clarify the level of depth for the project.] es for the project.] rategic.]	What was the problem? [Taik about the analysis phase of the project. What did you learn about the root cause of the problem you were facing? What were the gaps identified?] [Use a visual whenever possible and focus on the data collected – this shouldn't be a reiteration of your original problem statement, but rather new knowledge gained through the investigation process] What were the recommendations? [Provide information on the timeline of implementation plan]	What was the impact? \$ \$ \$ = [Discuss monetary, staff time, and/or resources savings. We targeted outcomes met? Did we increase the problem solving capacity of staff? What was the impact on the quality of services delivered and the impact on the customer (internal or external)?] What were the barriers and lessons learned? [Did these barriers limit the impact? How did you mitigate the barriers. What could be done differently next time a similar project is engaged?]
	Timeline [Enter a date below to reflect when you anti	cipate to complete each phase of your project.]		
Taroma	initiate investigate	improve implement		
CONTINUOUS IMPROVEMENT	XX/XX/XX XX/XX/XX	XX/XX/XX XX/XX/XX		

What Makes a Good Project?



Project Charter Front

Problem Statement

Date XX/XX/XXXX	Project Name of Project		
Team Sponsor: [Project Sponsor's Name] Team Lead: [Team Lead Name] Improvement Team: [List names here] Resources: [List names here]	Problem Statement [Craft a clear, concise problem statement that briefly size or magnitude of the problem; why it's a problem to a proposed set of the problem is occurring; the problem statement is not a question, not a proposed set of the problem on un-actionable complaint. If your statement has a question mark or solution in it, you're not done!] Scope [The scope should detail the start and end of the process. It can also clarify the level of depth for the project.] Process Start: Process End:		
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CONTINUOUS IMPROVEMENT	XX/XX/XX XX/XX/XX XX/XX/XX XX/XX/XX		

Craft a clear, concise statement that briefly states:

- Where and when (and how long) the problem is occurring
- The size or magnitude of the problem
- Why it's a problem/the impact
- Who the customers are (who is impacted)

-/ PROBLEM **STATEMENTS** IN **100 SECONDS**



Practice developing a problem statement using the case study.



Where, when, and how long?



What is the size or magnitude of the problem?



Why is this a problem?





Meals Per Hour Video

Case Study: Meals Per Hour



Problem Statement Pitfalls

After Superstorm Sandy, food relief agencies in NYC could not <u>efficiently</u> provide meals to hungry families. An <u>increase in donations was needed</u> to feed as many families as possible. Subjective adjectives
Predetermined solution
Impact not clear

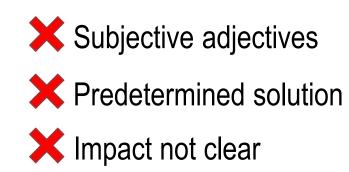
In October 2012, New York City was devastated by Superstorm Sandy.

Case Study: Meals Per Hour



Revised Problem Statement

After Superstorm Sandy, food relief agencies in NYC could not efficiently provide meals to hungry families. An increase in donations was needed to feed as many families as possible.



In October 2012, NYC was devastated by Superstorm Sandy. Relief agencies struggled to keep up with the demand for food. <u>Six months later</u>, people in the <u>Rockaways</u> are <u>still hungry</u>.



Size of problem identified

Uses facts and data

Impact is clear

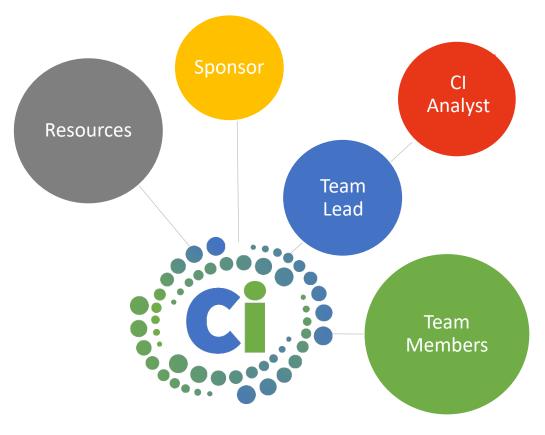
Further Refinement of the Problem Statement

 In October 2012, NYC was devastated by Superstorm Sandy. Six months later, customers waited in line for up to 3 hours for relief agencies to distribute 864 boxes (or 34,560) meals; demand exceeded available meals and the agencies turned away 400 hungry families.

Project Charter Front

Project Team

Date XX/XX/XXXX	Project Name of Project		
Team Sponsor: [Project Sponsor's Name] Team Lead: [Team Lead Name] Improvement Team: [List names here] [List names here]	Problem Statement [Craft a clear, concise problem statement that briefly states where and when (how long) the problem is occurring; the size or magnitude of the problem; why it's a problem/the impact; and who the customers are (who is impacted). A problem statement is not a question, not a proposed solution, nor an un-actionable complaint. If your statement has a question mark or solution in it, you're not done!] Scope [The scope should detail the start and end of the process. It can also clarify the level of depth for the project.] Process Start: Process End:		
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CONTINUOUS IMPROVEMENT	Timeline [Enter a date below to reflect when you anticipate to complete each phase of you initiate investigate improve XX/XX/XX XX/XX/XX	ur project.] implement XX/XX/XX	



CI Consultant (Facilitator)



- Focused on the process of problem solving
- Equipped with tools for exploring tough issues
- Invested in the team's success
- Dependent on the team for expertise and solving the problem
- Working for the whole team (not "just management", "just customers" etc.)
- Going to ask a lot of (obvious) questions



- An [insert process here] expert (They don't have "the answer")
- Invested in a particular outcome
- Going to let the team fail

Who are the Project Team?



TEAM LEAD

- Staff support on improvement team
- Often the process lead
- Provides project management and logistical support
- Keeps team in alignment with charter goals and boundaries
- Responsible for driving implementation

Who are the Project Team?



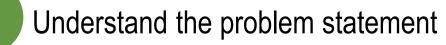
SPONSOR

- Manager with the decision-making authority over the process being reviewed
- Provides direction on goals and boundaries via charter
- Removes barriers to implementation
- Checks in periodically throughout improvement process

Successful Sponsorship



To be a successful sponsor...



- Ensure solutions fit
- Know what is good enough
- 4 Build the

3

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- Build the right team
- Manage to results



Quick Break



Who are the Project Team?

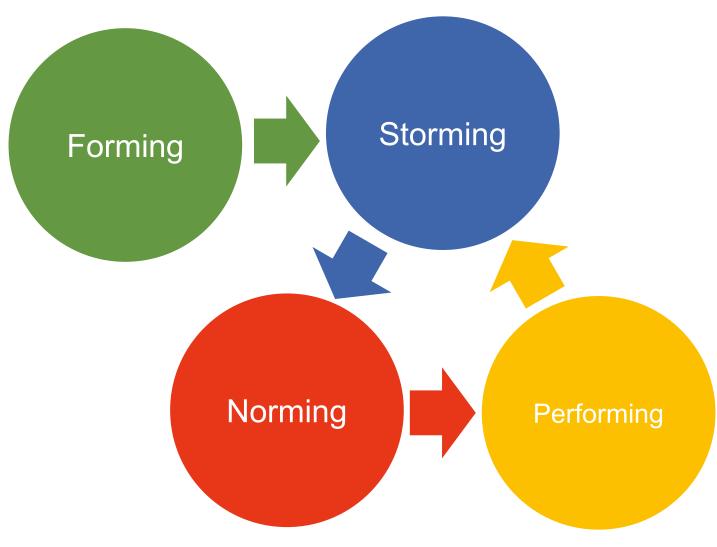
TEAM MEMBERS

- Subject matter experts tasked with understanding the current process and designing improved process
- Core group consistently involved throughout improvement project
- Assist with implementation and follow up assignments/ process adjustments
- Generate solutions/recommendations
- May include customers

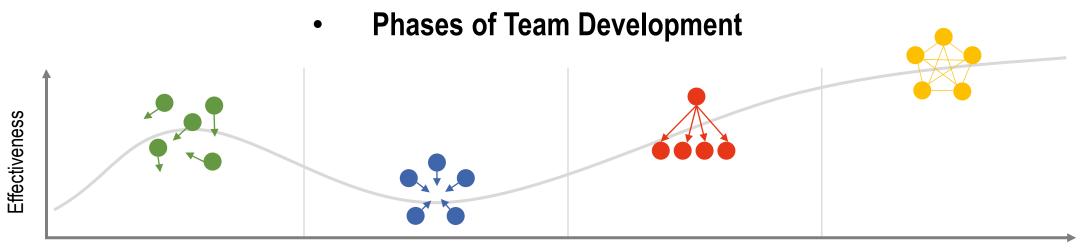
RESOURCES

- Subject matter experts, process co-owners and others who are" on call throughout the project but, do not participate regularly (not core team)
- May include outside vendors, internal service departments, interdepartmental management, or key customers

Tuckman Model



Tuckman Model



	Forming	Storming	Norming	Performing
Characteristics	 Feeling anxious and hesitant Feeling out ither team members Getting acquainted Learning roles and responsibilities Understanding team goals Looking to team leader for direction 	 Feeling competitive and tense Disagreeing with other team members Struggling to establish place in group Forming cliques Requiring team leader to facilitate discussion 	 Beginning to work more effectively Respecting each other's opinions and differences Agreeing on team rules Trusting and helping each other Not relying on team leader as much 	 Performing at a high level Making decisions and solving problems quickly and effectively Working independently

5 Characteristics of a Great Facilitator



Remember it's not about you Ask a lot of questions

Be a brilliant listener

Help to bring ideas together

Be external to the process

Additional Facilitation Guidance

Asking Questions



- Ask open-ended questions-
- Redirect
- You don't have to know it all!
- Let the team solve the problem

Know the Room



- Introverts vs Extroverts
- Watch for emotion and energy levels
- Shake up the seating chart
- Check that facility matches planned activities

Project Charter Front

Customer & Stakeholders

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	Timeline [Enter a date below to reflect when you anticipate to complete each phase of your project] initiate investigate improve implement	
CONTINUOUS IMPROVEMENT	XXXXXXX XXXXXXX XXXXXXX XXXXXXXX	

Customer

 The direct recipient of the output from a process or the individual(s) whom we will design the process for

Stakeholders

 Any group or individual who can affect or who is affected by the project's outcomes

Who are the Customer and Stakeholders?

CUSTOMER

- Direct recipient of your product or service
- Needs to be kept in mind throughout entire process
- Know the customer segments

STAKEHOLDERS

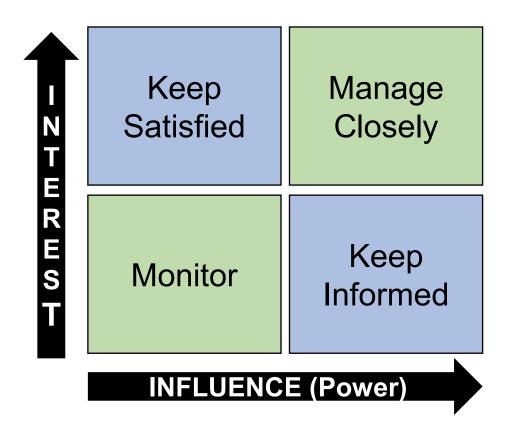
- Document relevant information about individuals, groups or enterprises and about their interests and involvement in the project
- Document how each player can influence the project and how they can be impacted by the project
- Determine their levels of importance

Stakeholder Tools

Stakeholder Analysis

Who? (Stakeholder: Customers, Team)	Issues & Concerns (What do they care about/role?)	Strategy (How can you help them?)

Interest vs. Influence Matrix



George

Warehouse Manager
 Metro Food Distribution





Practice completing a stakeholder analysis using the case study.

In small groups, identify stakeholders from the video and document their issues and concerns.

- Work together in groupsAssign 1 person to record

 - 1-2 mins for each report out

Who? (Stakeholder: Customers, Team)	Issues & Concerns (What do they care about/role?)	Strategy (How can you help them?)

Case Study: Meals Per Hour



Stakeholder Analysis Example

Who? (Stakeholder: Customers, Team)	Issues & Concerns (What do they care about/role?)	Strategy (How can you help them?)
Jamie and Lisa (CI Analysts) Toyota Production System Support Center (TSSC)	Jamie and Lisa will build relationship with Metro Food Bank staff and volunteers while hosting an improvement project. Their goal is to educate the project team and provide resources needed to ensure the project is successful	TSSC will educate food bank staff and volunteers on TPS process, aid in project documentation and lead facilitation for the duration of the project
George (Team Lead) Metro Food Bank	George wants to learn how to improve the process of packing and distributing meal boxes and guide his team on the TSSC process to insure they are included	George will lead the project team under the guidance of TSSC. He will help direct staff and volunteers to complete all needed tasks
Volunteers (Team) Rockaways Neighborhood group	Volunteers want to produce a complete meal box a quickly as possible boxes they can They desire a system to pack boxes that is organized and does not waste food or other resources	Volunteers will: serve on project team, assist in mapping current state and contributing new ideas for improvement
Meal Recipient (Customer)	Meal recipients want to pick up food in a convenient location close to their home or work and do not want to wait in a long line to be served	Meal recipients may provide feedback on their experience receiving meal boxes before and after the improvements are made to validate the proposed changes.

Project Charter Front

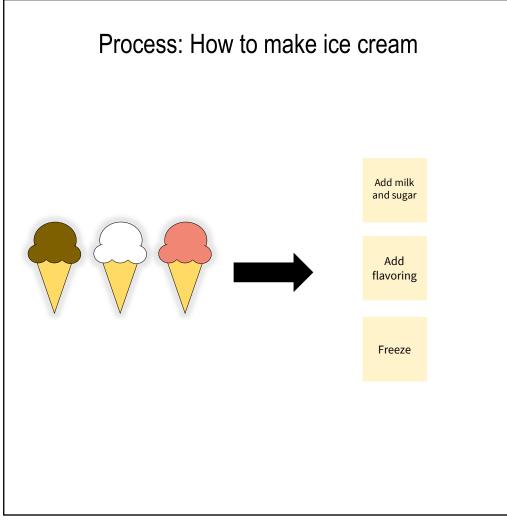
Scope = (Start + End) +/- "Flavors"

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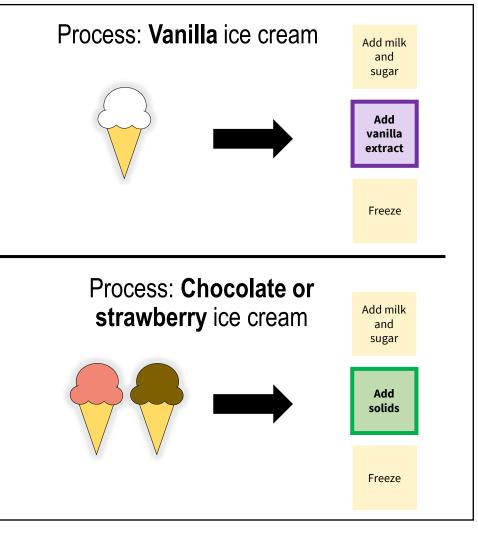
Scope defines the distinct business process in which you will target your improvement efforts:

- Define the scope by identifying the start and end of the business process you are focused on
- Consider any "flavors" or variations of your business process that you may choose to include or exclude

Flavors of Scope Same Process For All



Distinct Processes



Project Charter Front

Boundaries

Date XX/XX/XXXX	Project Name of Project		
Team Sponsor: [Project Sponsor's Name] Team Lead: [Team Lead Name] Improvement Team: [List names here] Resources: [List names here]	Problem Statement [Craft a clear, concise problem statement that briefly states where and when (how long) the problem is occurring; the size or magnitude of the problem; why it's a problem/the impact; and who the customers are (who is impacted). A problem statement is not a question, not a proposed solution, nor an un-actionable complaint. If your statement has a question mark or solution in it, you're not done!] Scope [The scope should detail the start and end of the process. It can also clarify the level of depth for the project.] Process Start: Process End:		
Stakeholders Customer: [The direct recipient of the output from this process. The single individual/category of	Targeted Outcomes [Use SMART goals where possible as targeted outcomes for the project.] [A few of the goals can be more qualitative/long term/strategic.]		
individuals for whom we will design this process] Other Stakeholders: [List categories of stakeholders here]	 Boundaries [Be very selective of what you consider a bound for the selective of what you consider a bound for the selective of a boundary we must prive in another direction.] [Boundaries are completely off limits – when a monotonic of a boundary we must prive in another direction.] 		
	Time line [Enter a date below to reflect when you anticipate to complete each phase of your project.]		
CONTINUOUS IMPROVEMENT	initiate investigate improve implement XX/XX/XX XX/XX/XX XX/XX/XX XX/XX/XX		

Boundaries include any options or factors that limit the project team or the **potential solutions** produced by the project:

- Boundaries are considered completely "off limits"
- Examples of boundaries could be resource constraints, legal limitations or areas of the process that your team does not want to address

Case Study: Meals Per Hour



Practice developing a scope and boundaries using the case study.

If we were leading this project, how would we identify the scope and boundaries?

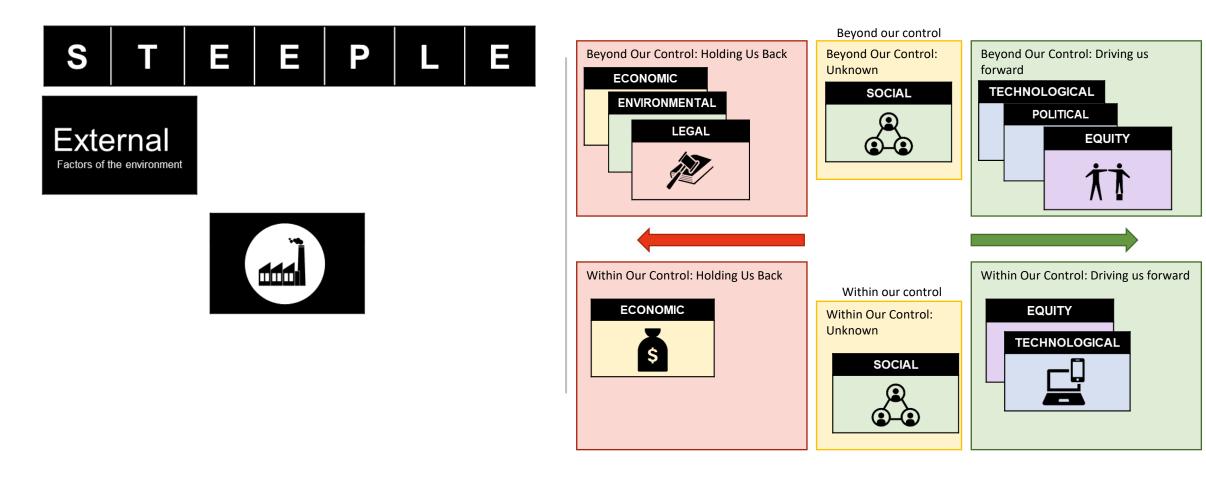
What is the process start?
What is the process end?
What are possible "flavors?"
Suggested boundaries?"



Environmental Scan

STEEPLE

Environmental Scan



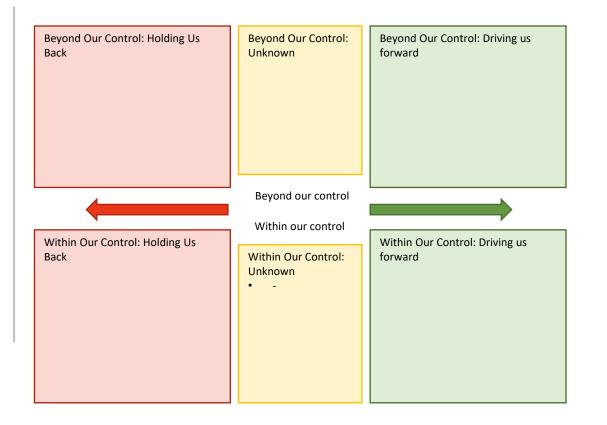
Case Study: Meals Per Hour



Practice scanning the environment with an Environmental Scan using the case study.

If we were leading this project, what factors could impact the outcome or potential improvements?

Client demographics?
Neighboring businesses?
Food safety regulations?
Work together in groups



Environmental Scan

	Beyond our control	
Beyond Our Control: Holding Us Back • -	Beyond Our Control: Unknown • -	Beyond Our Control: Driving us forward • -
Within Our Control: Holding Us Back • -	Within our control Within Our Control: Unknown • -	 Within Our Control: Driving us forward -

Project Charter Front

Targeted Outcomes & Timeline

Date XX/XX/XXXX	Project Name of Project
Team Sponsor: [Project Sponsor's Name] Team Lead: [Team Lead Name] Improvement Team: [List names here] Resources: [List names here]	Problem Statement [Craft a clear, concise problem statement that briefly states where and when (how long) the problem is occurring; the size or magnitude of the problem; why it's a problem: the impact; and who the customers are (who is impacted). A problem statement is not a question, not a proposed solution, nor an un-actionable complaint. If your statement has a question mark or solution in it, you're not done!] Scope [The scope should detail the start and end of the process. It can also clarify the level of depth for the project.] Process Start: Process End:
Stakeholders Customer: [The direct recipient of the output from this process. The single individual/category of individuals for whom we will design this process] Other Stakeholders: [List categories of stakeholders here]	Targeted Outcomes • [Use SMART goals where possible as targeted • [A few of the goals can be more qualitative/long 6 regic.] Boundaries • [Be very selective of what you consider a boundary – question thoroughly before you agree to include one.] • [Boundaries are completely off limits – when a project starts drifting in the direction of a boundary we must pivot in another direction.]
CONTINUOUS IMPROVEMENT	Timeline [Enter a date below to reflect when you anticipate to complete each phase of your project.] improve implement xx/xX/xx xX/xX/xx XX/XX/xx XX/XX/xx

Targeted outcomes help us answer the question: How will we know we are successful?

• A few of the goals can be more qualitative/long term/strategic.

The project timeline should set dates to reach milestones for each phase in the ci4i framework

 You may include additional milestones as needed

SMART Goals and HARD Goals



Specific: Action oriented with clear outcomes.

Measurable: Metrics and data based, prove success.

Achievable: Within scope and possible to do.

Relevant: Improves work/ results and addresses needs. Timely: State when work will

be done and timeframe.



Heartfelt: Why is it worth it?



Animated: What will it look like?



Required: Why is it urgent?



Difficult: What will you become?

Case Study: Meals Per Hour



Targeted Outcome Examples

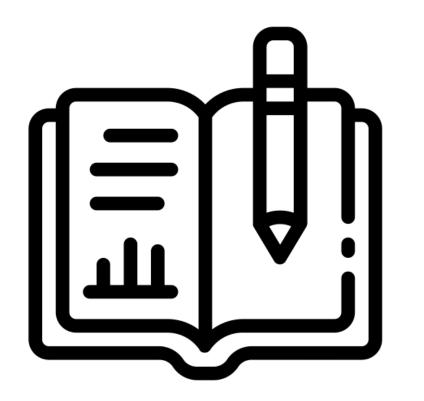
Develop a survey to collect feedback from clients while they are picking up their box.

A task is not a measurable goal
Unclear how it addresses needs
No timeline to achieve

Reduce the client wait time during box distribution from 15 minutes to 3 minutes or less within 8 weeks.

Related to problem statement
Can be measured to assess result
Timeline is clear

Homework



Project Work

- □ Identify a Project
 - Meet with Sponsor to confirm project & gather required information for Project Charter
- Draft (Download on Next Page)
 - Project Charter- Print and Bring to Day 2!
 - Focus on Problem Statement
 - Stakeholder Analysis
 - Environmental Scan
 - High-Level Current State Process Map
 - Outline high-level steps 1-9, without detail
 - The first and last step will help to shape your Charter Scope

Office Hours

- □ Schedule & Attend Office Hour
 - With your Assigned CI Consultant
 - Review Project Work

Note: Must occur prior to next CIA In Person Session

Miscellaneous Tasks

- Generation Calendar Invite to leadership
 - From: improve@cityoftacoma.org
 - Forward to Project Sponsor, Project Champion, Other Management as deemed appropriate

Note: Your immediate management has already been invited

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