

2018 BRINGING ADMINISTRATORS TOGETHER CONFERENCE

# Business Process Improvement (BPI) Shared Services – Helping You Save Resources

April 5, 2018

**UIC** UNIVERSITY OF ILLINOIS  
AT CHICAGO

**UIC**

Lincoln Hall

707 South Morgan Street

**Conference Sponsors:** The Office of the Chancellor, Budget & Financial Administration / Human Resources, the Office of the Provost and Vice Chancellor for Academic Affairs, the Office of the Vice Chancellor for Research, and the Office of Business and Financial Services

# Please ...

- Turn off cell phones.
- Avoid side conversations.
- Sign the attendance roster.
- Complete the evaluation at the end of the workshop.
- Ask questions.

# Workshop Presenters

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# Who is the Business Process Improvement Shared Service?

“We provide support to University initiatives seeking to increase the *efficiency* and *effectiveness* of University operations...”

- ✓ Free Up Staff Time
- ✓ Improve Customer Service
- ✓ Reduce Total Cost
- ✓ Deliver Services Faster

Project Engagements

Methodology & Tools

Training & Programs

[processimprovement@uillinois.edu](mailto:processimprovement@uillinois.edu)

<http://go.uillinois.edu/bpi>

# How can we help?

- Solving problems
  - Developing and maintaining focus
  - Organizing thoughts
  - Opening the lines of communication
  - Analyzing data & flow
- Helping others solve problems
  - Developing and maintaining methodology
  - Providing tools to support engagement teams
  - Providing training on the concepts and tools

# BPI Highlights – FY 17

Led  
**19**

process analysis  
or improvement  
events

**62**

recommendations  
for process  
improvement  
within UIC,  
UIUC, and the  
System Offices

Trained

**270**

participants  
in process  
improvement  
concepts, tools,  
and techniques,  
bringing the  
total trained  
since Fall 2011  
to

**Almost 1,700**

Directly  
engaged over

**70**

units through  
participation  
in training and  
project work or  
by supporting  
the BPI Shared  
Service  
extended team

# Menu of Services

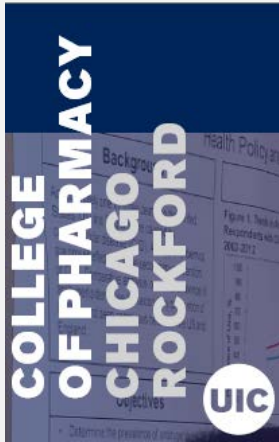
- **Process Improvement Projects:** BPI facilitators will manage your project using RAPID process improvement methodology
- **Process Mapping:** BPI facilitators will help to document the current state of the process or help you to develop the preferred future state.
- **Analysis Projects:** BPI facilitators will analyze your processes to assist in determining where a process improvement project would provide the biggest impact.
- **Facilitation:** BPI facilitators will coordinate a meeting to determine lessons learned from a project, a meeting focused around improving a process, or a meeting whose goal is to get two cross-functional units to communicate.

# **BPI PROJECTS @ UIC**



# Building Partnerships

## BPI Shared Service Chicago Internal Relationships



**HUMAN  
RESOURCES**



**SCHOOL OF  
PUBLIC HEALTH**



**COLLEGE  
OF DENTISTRY**



**UNIVERSITY OF ILLINOIS**  
Hospital & Health Sciences System  
Changing medicine. For good.

**UNIVERSITY  
OF ILLINOIS**



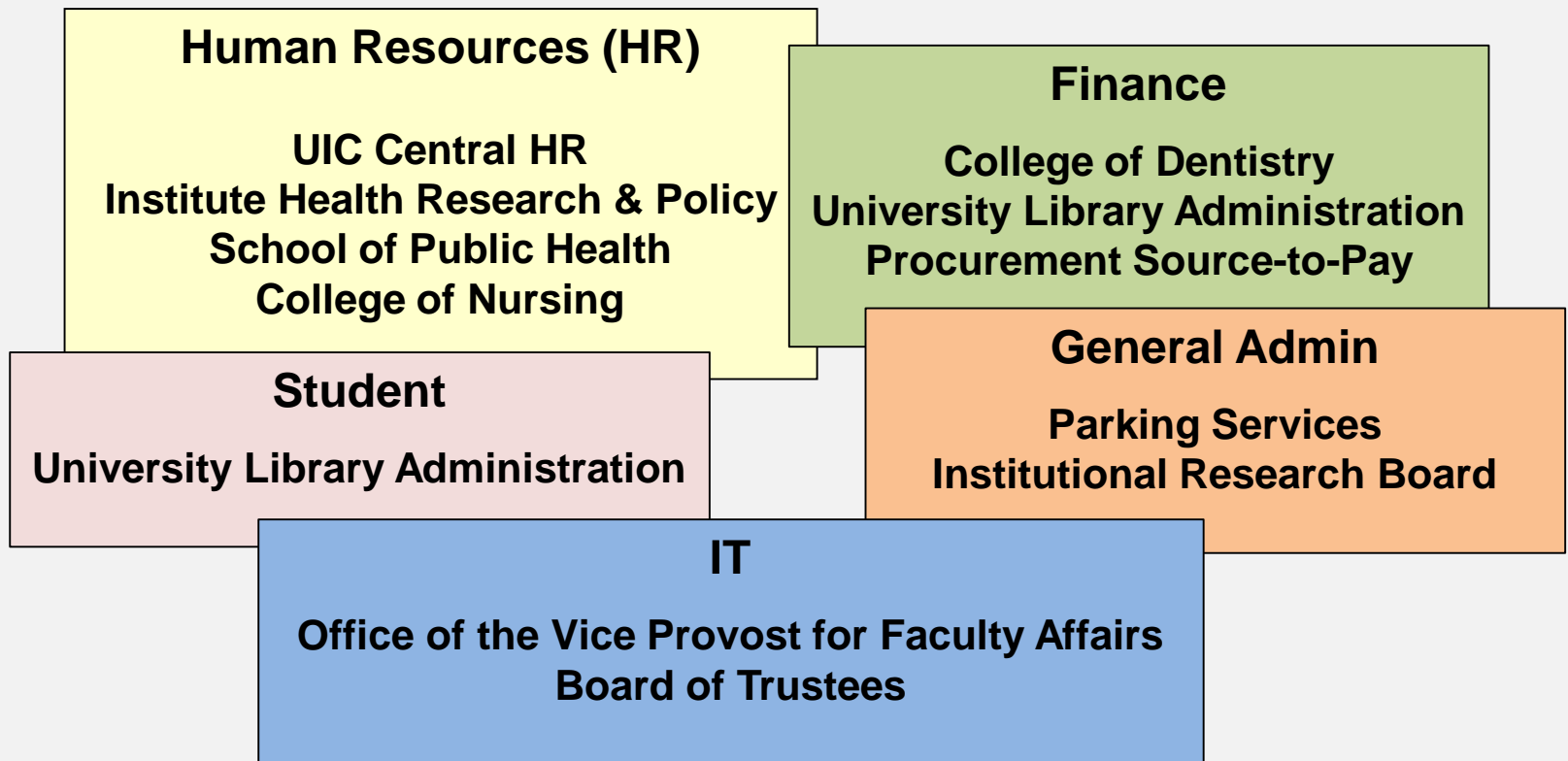
**Office of  
Sustainability**

**OFFICE OF  
THE VICE PROVOST  
FOR FACULTY  
AFFAIRS**



**UIC** INSTITUTE FOR HEALTH  
RESEARCH AND POLICY

# Types of Analyses & Projects University of Illinois at Chicago



# Recent / Current Efforts

## University of Illinois at Chicago

- School of Public Health HR Process Analysis
- University Procurement Source-to-Pay
- Institutional Research Board (IRB) Protocol Review Process Improvement
- College of Nursing HR Faculty Hire Process Analysis
- Library B.E.S.T. Procurement Process Analysis
- Daley Library Student Hire Process (WR)

# RAPID Methodology

A methodology used to manage a business process improvement event when analyzing a business process to identify improvements utilizing the Lean concepts where the issue or problem is known and a solution needs to be identified.

# RAPID Methodology

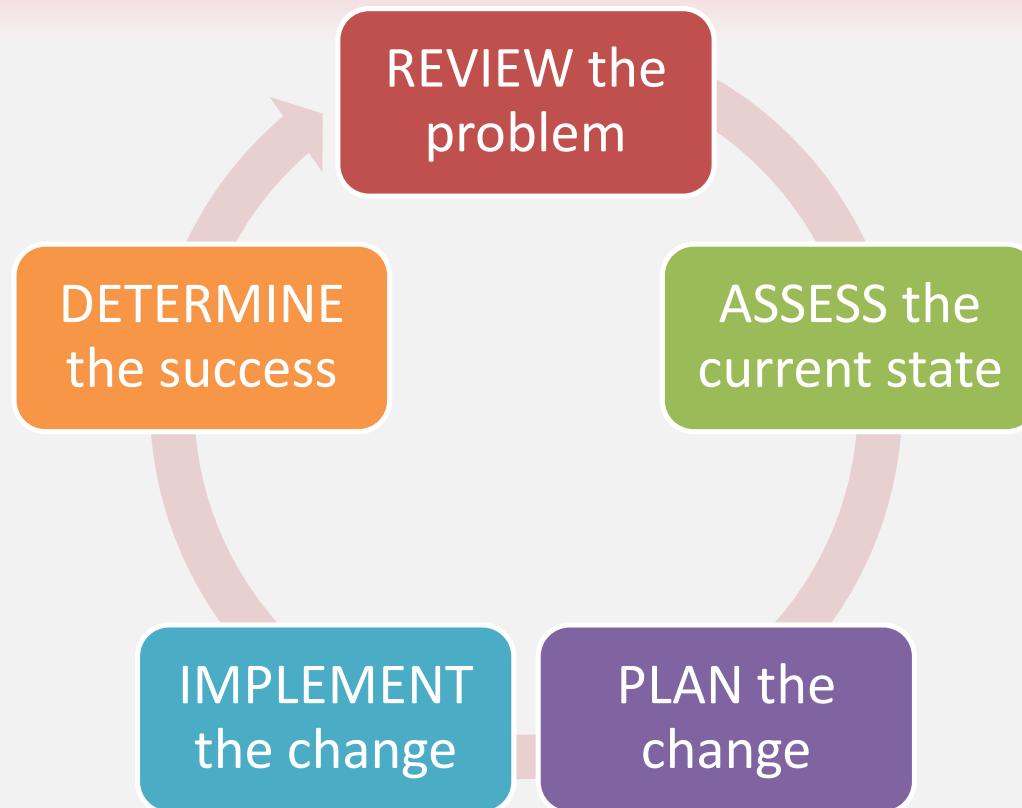
- A 10-14 week\* cycle of preparation, action, and follow-up to improve one area or fix a problem
- Project team: Project Sponsor, Process Owner, subject matter experts, and those who run the process on a daily basis.
- Led by: Process Improvement Facilitator or Team Lead

\*10 weeks is the standard time frame. Some projects may run longer due to complexity and availability of the team.

# RAPID Methodology

- Improve Quality
- Reduce Lead Time
- Eliminate Waste/Streamline
- Reduce Total Costs
- Improve Customer Service

# RAPID Methodology



# RAPID Methodology

- Review the Problem
  - Project charter, scope, team and timeline
- Assess the Current State
  - Process mapping, issue identification, data collection
- Plan for the Change
  - Solutions, future state process map, action plan
- Implement the Change
- Determine the Success
  - Data collection and comparison



# BPI Project Engagement Timeline

University of Illinois RAPID Process Improvement Methodology – Engagement Timeline												
	Pre-Project (2-6 weeks)	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Post-Project
Activities	<b>Review the Problem</b>	<b>Assess the Current State</b>			<b>Review</b>		<b>Plan for Change</b>				<b>Review</b>	<b>Implement Improvements</b>
	Develop Goal Statement	Map current state process	Review/Revise process map	Conduct Focus Groups	Incorporate Focus Group Feedback	Conduct project sponsor review	Review current state analysis	Finalize solution ideas	Conduct Focus Groups	Incorporate Focus Group Feedback	Conduct project sponsor review	
	Identify Key Objectives & Metrics	Finalize Data Collection Plan	Identify & categorize process issues		Finalize Data Analysis	Incorporate Review Feedback	Brainstorm solution ideas	Formalize recommendations		Prioritize recommendations	Incorporate Review Feedback	
	Determine Scope	Start Data Analysis	Prepare for Focus Groups		Finalize current state documentation			Prepare for Focus Groups		Finalize Future State Map		
	Survey customers				Prepare for Reviews			Start future state map		Develop Action Items		
Team Members	Working Sessions: 2 Hours/week Preparation: 2 Hours/week	Working Session: 4 Hours	Working Session: 4 Hours		Working Session: 2 Hours	Review Sessions: 2 Hours	Working Session: 4 Hours	Working Session: 4 Hours		Working Session: 4 Hours	Review Sessions: 2 Hours	
Sponsor	Working Sessions: 2 Hours/week					Review Sessions: 2 Hours					Review Sessions: 2 Hours	
Facilitator	Preparation: 4 Hours/week Working Sessions: 2 Hours/week	Preparation: 4 Hours Working Session: 4 Hours	Preparation: 8 Hours Working Session: 4 Hours	Preparation: 2 Hours Focus Group Sessions: 2 Hours Each	Preparation: 8 Hours Working Session: 2 Hours	Preparation: 6 Hours Review Sessions: 2 Hours	Preparation: 4 Hours Working Session: 4 Hours	Preparation: 8 Hours Working Session: 4 Hours	Preparation: 2 Hours Focus Group Sessions: 2 Hours Each	Preparation: 8 Hours Working Session: 4 Hours	Preparation: 6 Hours Review Sessions: 2 Hours	
Business Analyst	Documentation: 2 Hours/week Working Sessions: 2 Hours/week	Working Session: 4 Hours Documentation: 10 Hours	Working Session: 4 Hours Documentation: 10 Hours	Focus Group Sessions: 2 Hours Each Documentation: 10 Hours	Working Session: 2 Hours Documentation: 4 Hours	Review Sessions: 2 Hours Documentation: 2 Hours	Working Session: 4 Hours Documentation: 6 Hours	Working Session: 4 Hours Documentation: 6 Hours	Focus Group Sessions: 2 Hours Each Documentation: 4 Hours	Working Session: 4 Hours Documentation: 8 Hours	Review Sessions: 2 Hours Documentation: 4 Hours	
Data Analyst (if needed)	Research + Prep: 12 Hours	Documentation: 8 Hours Working Session: 4 Hours	Collect data: 16 Hours Working Session: 4 Hours	Analysis/visualization: 16 Hours	Finalize and Preparation: 16 Hours	Review Sessions: 2 Hours						

The BPI Engagement Timeline visually shows the project commitments and meeting deliverables per project phase:

**PRE-PROJECT**  
2-4 weeks

**ASSESS (Current State)**  
5 weeks

**PLAN (Future State)**  
5 weeks

**Post-PROJECT**  
several weeks

# BPI RAPID Checklist

Project Name:				
Review the Problem	Assess the Current State	Plan for Change	Implement Changes	Determine Success
Schedule and hold project planning meeting with Project Sponsor and Process Owner.	Map current process using <u>Process Mapping Techniques and Tools</u> .	Review goal, issue list, and solution ideas.	Communicate <u>Solution Action Plan</u> to affected stakeholders.	Assist Process Owner with any problems or issues that are preventing improvements from being sustained.
Verify the <u>SIFOC Map</u> from the <u>Proposal</u> if provided. Create a <u>SIFOC Map</u> if one wasn't provided.	Identify issues related to problem statement.	Brainstorm improvement ideas using <u>Brainstorming Techniques</u> .	Determine frequency and location of check-in meetings & Hold check-in meeting[s]. Create meeting agenda using <u>Check-in Meeting Agenda</u> .	Meet with team and Project Sponsor to review lessons learned and evaluate need for future projects.
Review the goal and problem statement from the <u>Proposal</u> if provided. Create both the goal and problem statement if one wasn't provided. The <u>Project Definition Worksheet</u> can help to build the goal and problem statements.	Analyze performance data collected using the <u>Data Collection Plan</u> . Chart data using the <u>Chart Selection Decision Tree</u> as a guide.	Prioritize solution ideas using the <u>Solution Prioritization Matrix</u> .	Implement <u>Solution Action Plan</u> .	
Identify metrics to support goal or problem statement. Develop initial <u>Data Collection Plan</u> in order to baseline metrics.	Prepare for, conduct, and incorporate feedback from Focus Groups (OPTIONAL).	Develop a future state process map using <u>Process Mapping Techniques and Tools</u> .		
Start the <u>Project Charter</u> .	Identify focus (i.e., most impactful issues) for future improvement brainstorming sessions.	Prepare for, conduct, and incorporate feedback from Focus Groups (OPTIONAL).		
Create a <u>Project Plan</u> . Create project planning meeting agenda with the <u>Project Planning Meeting Agenda</u> template.	Review project work with Project Sponsor.	Develop <u>Solution Action Plan</u> .		
Create the <u>Communication Plan</u> .		Review project work with Project Sponsor.		
Obtain signoff for the <u>Charter</u> .		Finalize project summary (i.e., Final Report), including latest metric data indicating level of improvement.		
Schedule and hold project kickoff meeting with team. Create kickoff meeting agenda with the <u>Kickoff Meeting Agenda</u> template.		Deliver project summary to appropriate Stakeholders.		
Schedule sessions and reserve meeting locations.		Conduct <u>Lessons Learned Survey</u> .		
Prepare facilitator toolkit with supplies (e.g., post-it's, markers, etc.) and the associated tools relevant to the project.				
Associated Tools				
Project Charter	5 Why's	Solution Action Plan	SS Methodology Guide	Data Collection Plan
Communication Plan	Affinity Diagram	Solution Prioritization Matrix	Check-in Meeting Agenda	Solution Action Plan
Kickoff Meeting Agenda	Brainstorming Techniques	Process Mapping Techniques & Tools	Solution Action Plan	
Project Definition Worksheet	Cause & Effect Diagram (Fishbone Diagram)	Brainstorming Techniques		
Project Plan	Chart Selection Decision Tree	Affinity Diagram		
Project Planning Meeting Agenda	Data Collection Plan	Recommendation Worksheet		
Proposal	Pareto Chart	<b>Focus Group Report/Agenda/Plan</b>		
SIFOC Map	Process Mapping Techniques & Tools	Facilitation Techniques		
	Waste Walk Worksheet	Final Report		
	<b>Focus Group Report/Agenda/Plan</b>	Lessons Learned Survey		

The BPI RAPID Checklist breaks down the specific documents that must be completed in each phase

# **BPI TRAINING**

# Current Training Offerings

## Lean Concepts

In this training course, participants will learn about Lean concepts and tools:

- which will help uncover and eliminate unnecessary activities
- and make their work more efficient



## Facilitation Skills

The course will cover the fundamental facilitation tools that can be applied to any type of facilitated session.

**This interactive workshop is intended for new facilitators who want to develop and/or improve their facilitation skills**



# Training: BPI Facilitation Cohort

The Business Process Improvement (BPI) Facilitator Training Program is an intensive program designed to develop participants in the art and science of facilitating process improvement efforts at the University of Illinois.

**The Business Process Improvement Facilitator Training Program helps build “internal consultants” who can lead change within their department and throughout the University of Illinois.**



# Quarterly Seminars: BPI Community Series



Join the BPI Shared Service for the Community Series: a free, ongoing quarterly seminar series that highlights process improvement and efficiency topics.

**This community-based series is free and open to any University employee interested in learning more about process improvement and how to use those tools to solve their issues. This is also a great opportunity to network with your peers.**

# Quarterly Seminars: BPI Community Series



# BPI TOOLS



# Tool: 5S

5S A methodology for organizing, cleaning, developing, and sustaining a productive work environment. The S's stand for: Sort. Set In Order. Shine. Standardize. Sustain.

**The value of 5S includes:**

- **Ownership of workspace**
- **Improved productivity**
- **Improved maintenance**



# Tool: Brainstorming Techniques



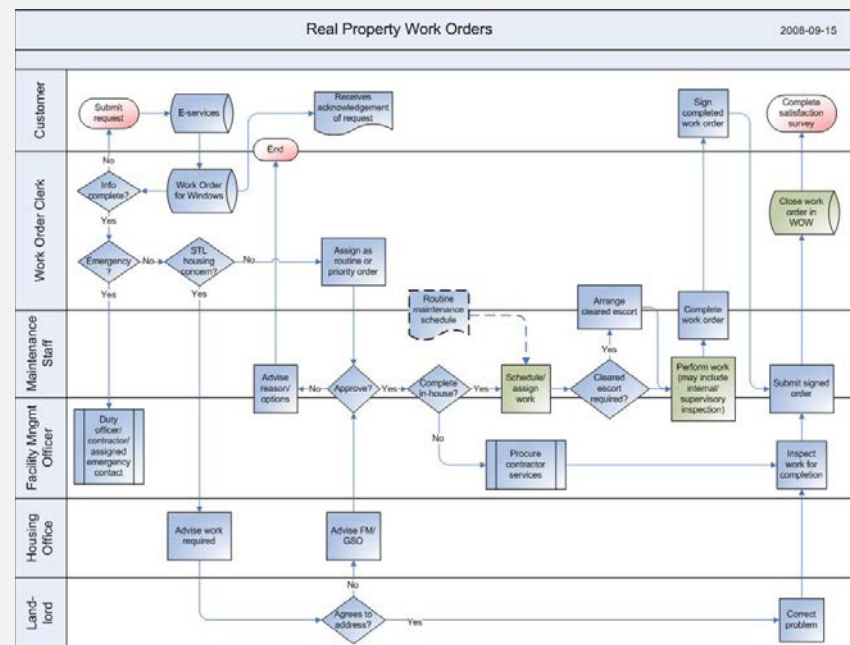
A group problem-solving technique that involves the spontaneous contribution of ideas from all members of the group through intensive and freewheeling group discussion.

# Tool: Process Mapping



















Process mapping is a workflow diagram to bring forth a clearer understanding of a process or series of parallel processes.

## Benefits Include:

- **Collective understanding of the process complexity and impact**
- **Identification of opportunities for improvement**
- **Communicating issues**
- **Training new staff**
- **Implementing change**



# Tool: Liberating Structures (Team Collaboration)

LS Menu 	Wicked questions 	What? debrief 	Min specs 	Heard, seen respected 	What I need from you 	Integrated autonomy 
Design elements 	Appreciative interviews 	Discovery and action dialog 	Improv prototyping 	Drawing together 	Open space 	Critical uncertainties 
1-2-4-All 	TRIZ 	Shift & share 	Helping heuristics 	Design storyboards 	Generative relationships 	Ecocycle 
Impromptu networking 	15% solutions 	25 : 10 crowdsourcing 	Conversation café 	Celebrity interview 	Agree/certainty matrix 	Panarchy 
9-whys 	Troika consulting 	Wise crowds 	User experience fishbowl 	Social network webbing 	Simple ethnography 	Purpose to practice 

Liberating Structures offers a framework and more than 30 different "micro-structures" to get teams to work better together.

## Benefits include:

- Innovation
- Inclusion
- Participation
- Clarity
- Purpose
- Fun

Contact Us  
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Questions?