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LEAN + DESIGN

The creative application of lean to strategically engage, collaborate, and succeed together

Virtual Conference 2022- October 19, 20 & 21

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The Scalability of Lean HE

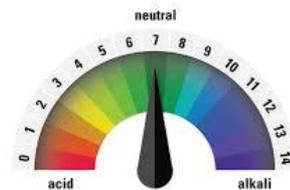
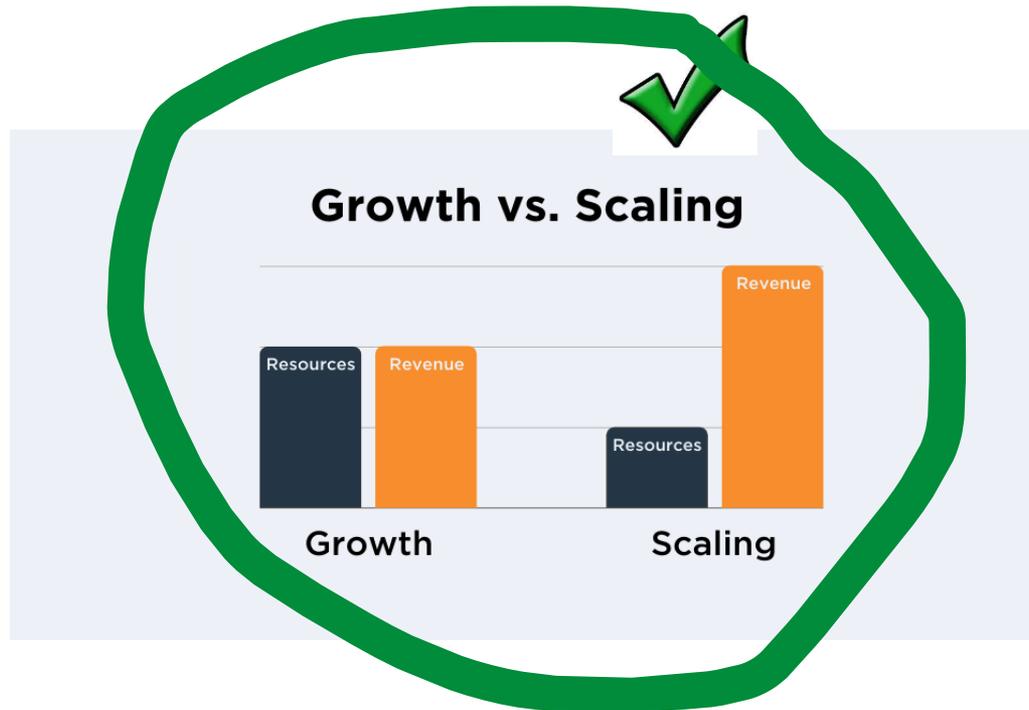
Why Isn't This Great Idea Taking Off?

Bill Balzer

Bowling Green State University

apeiron consulting

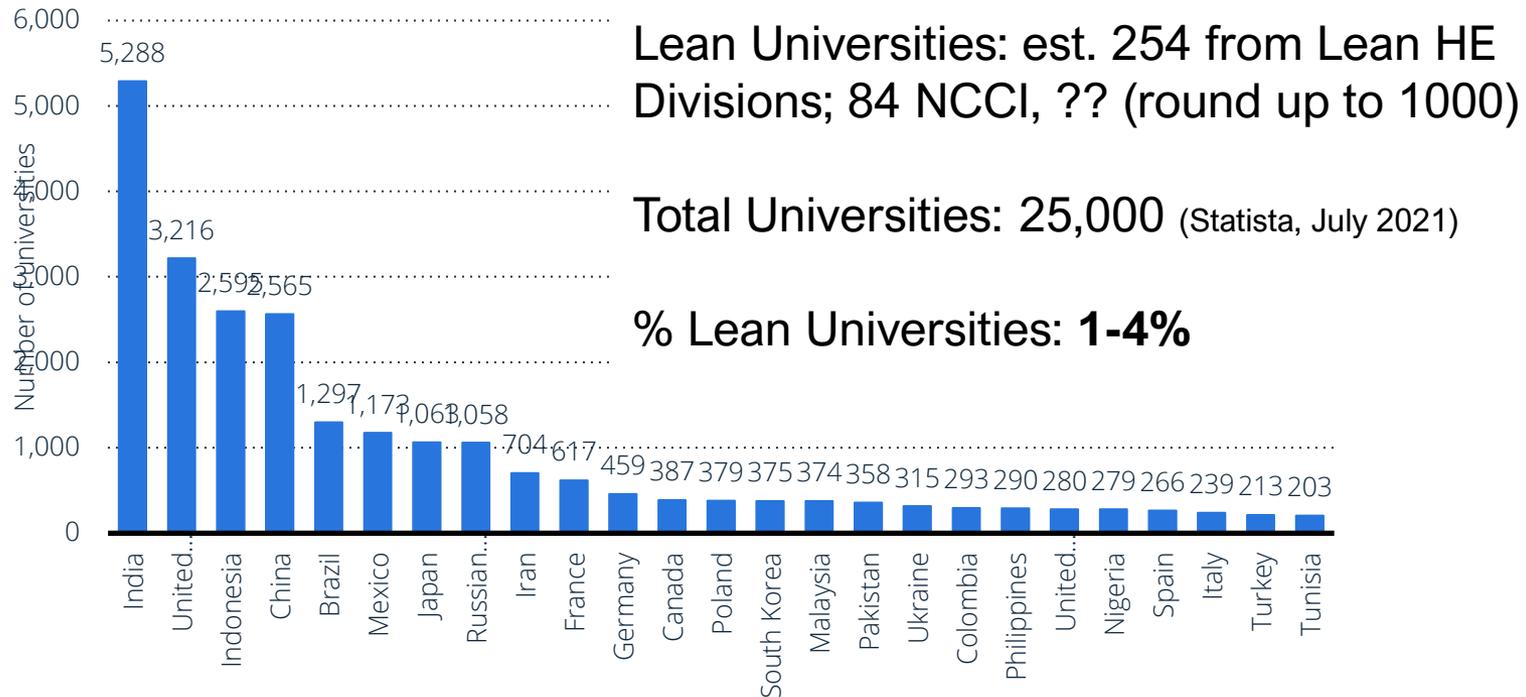
What Do I Mean By “Scale?”



pH scale



Penetration Across: So Many Universities, So Little Lean



Penetration Within: “Institution-Wide” Applications of LHE?

Using a very liberal criterion,

And a non-representative sample of 26 case studies (Balzer 2010, 2020; Yorkstone, 2020):

2/3 used LHE in two or more
functions/areas

WHY: Few LHE Institutions or Deep Penetration within an HE Institution?

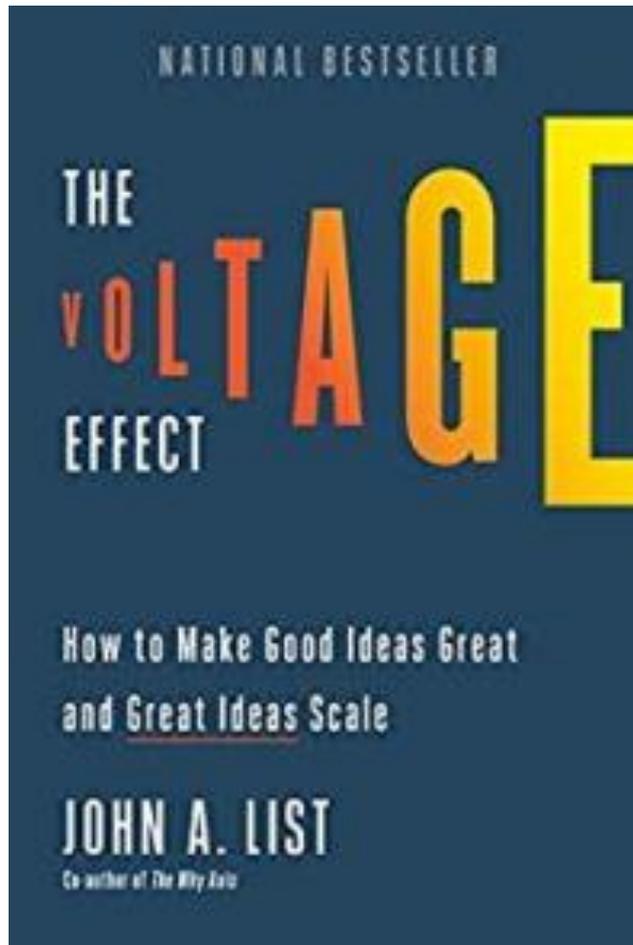
Some Possible Root Causes

- Lack of Awareness
- Lack of Knowledge
- Lack of Motivation
- Lack of Success
 - No improvement
 - Under-resourced
 - Impatience
 - Aborted



OR: Voltage Drop of Lean HE?

Looking Outside Lean and HE: Insights from a world-class economist



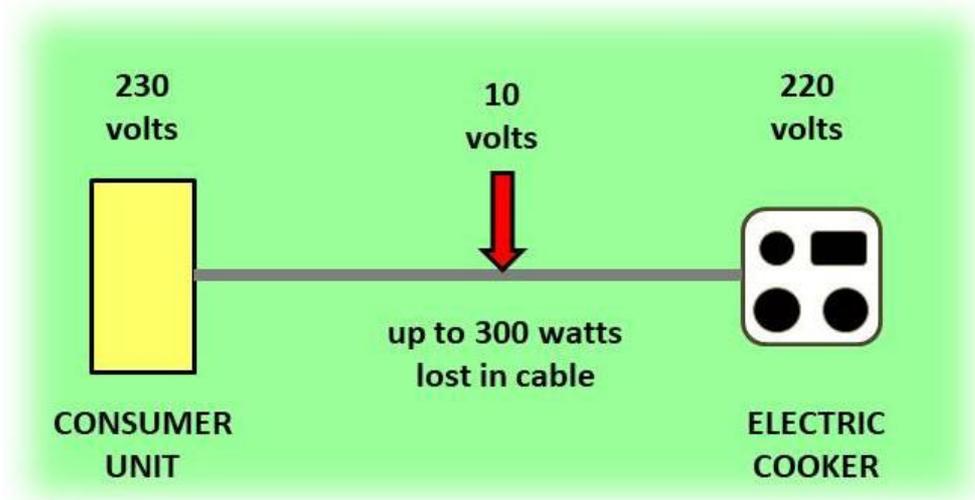
Key Points:

1. If an enterprise has weaknesses, they will reveal themselves at scale
2. Scalable ideas and solutions are the most valuable resource for addressing urgent problems

Voltage Drop Metaphor

“... what happens when the great electric charge of [LHE] potential that drives people and

organizations dissipates, leaving behind dashed hopes, not to mention squandered money, hard work, and time.” (List, 2022, p. 13)



Two Ways to Think About the Scalability (or voltage drop) of Lean HE

1. The scalability of Lean HE across HE institutions

e.g., from U St Andrews to HE institutions in Europe, Australia/Pacific, Americas, Middle East/Africa, etc.

2. The scalability of Lean HE within an HE institution

e.g., from one function or office in an HE institution (“early adopter/pilot program” in finance and administration) to all HE functions and offices: academic affairs, student affairs, human resources, teaching & learning, ITS, etc.

Voltage Drop: Multiple Ways Great Ideas Like LHE May “Fail at Scale”

Five “voltage drop” hurdles LHE must clear:

1. “False Positives:” LHE doesn’t work
2. Limited target audience for LHE
3. Unscalable LHE ingredients
4. Unintended consequences of LHE
5. LHE too costly to sustain at scale



One missed hurdle prevents a good idea (such as LHE) from successfully scaling!

“False Positives:” Lean Doesn’t Work (or at least doesn’t work in HE)



This hurdle cleared:

- **Successful applications of Lean across all business and industry sectors** (Balzer et al., 2019)
- **Institution-wide applications of LHE across institutions** (e.g., Miami U, U Strathclyde, Des Moines Area CC)
- **Many applications of LHE within institutions**

<u>True negative</u> Predicted negative Actual negative	<u>False positive</u> Predicted positive Actual negative
<u>False negative</u> Predicted negative Actual positive	<u>True positive</u> Predicted positive Actual positive 



BUT in HE: Truly 100% institution-wide, CI+RfP, & full evidence?

Limited Target Audience for LHE (Poor fit: awareness/interest/readiness)



**Significant hurdle
across and within HE
institutions:**

- Incompatible culture
- Lack of leadership support
- Low levels of readiness
- Misaligned practices (e.g., reward & recognition, motivation)



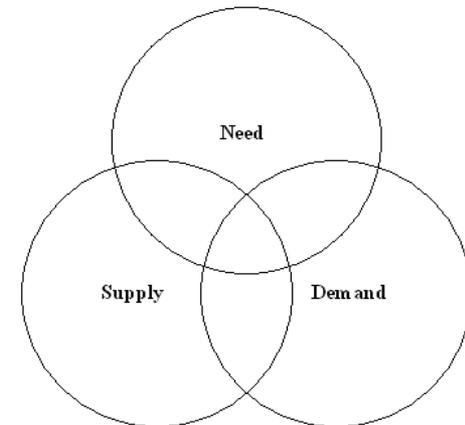
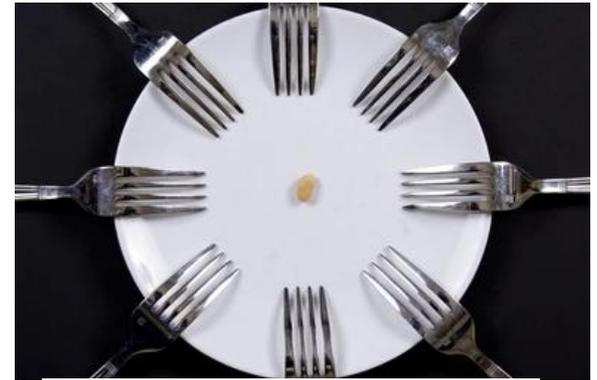
Unscalable LHE Ingredients

(Not enough “secret sauce” to go around)



Significant hurdle:

- Limited supply: LHE advocates
- Limited supply: LHE program builders
- Limited supply: Experienced LHE facilitators
- Limited supply: LHE consultants (committed to CI + RfP and building capacity)



Unintended Consequences (Spillover of Lean HE on the HE sector)

 **Possibly a hurdle (in the future):**

Usually most visible when scaled (from 4% to 40% LHE institution)

SCENARIO 1: Increased number of LHE institutions will result in loss of competitive advantage (i.e., increased HE supply, same student demand)

SCENARIO 2: LHE institutions become more selective due to increased number of student applications (same HE supply, increased student demand)

Not all unintended consequences are negative!

SCENARIO 3: Increased number of LHE institutions compels true LHE institution to become even Lean-er

The Cost of Scaling LHE

(Economies or diseconomies of scale?)

Mixed Bag

Economies of scale: reducing the cost of LHE intervention/activities to generate a (greater) ROI

Decentralized LHE = SCALING: Cost decreases over time (expanded # of employee facilitators can conduct larger # of projects increasing ROI)

Centralized LHE = GROWTH: Cost increases over time (expanded LHE office staff needed to conduct larger # of projects holding ROI constant)

Summary: Hurdles That May Prevent LHE from Scaling (even though it may actually work)

Assessment of FIVE “voltage drop” hurdles LHE must clear:

  “False Positives:” LHE doesn’t work

 Limited target audience for LHE

 Unscalable LHE ingredients

 Unintended consequences of LHE

 LHE too costly to sustain at scale

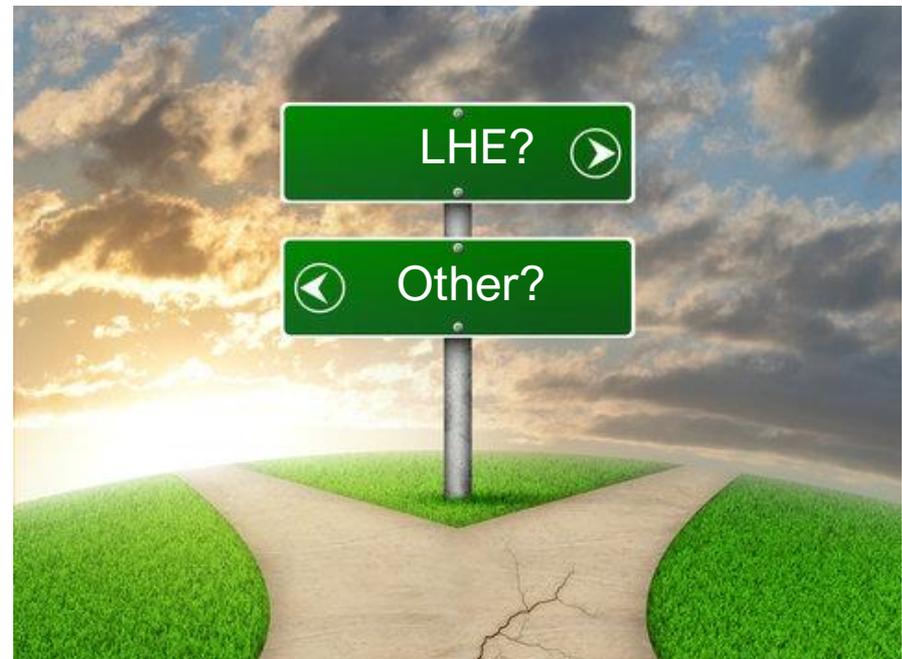


One missed hurdle would limit the broader, successful scaling of LHE

Where Do We Go From Here?

Key Points (adapted from List, 2022):

1. If LHE has weaknesses, they will reveal themselves at scale
2. Scalable ideas and solutions are the most valuable resource for addressing HE's most urgent problems



What's Your Vision for the Future of LHE?

LHE's future is secure

- LHE's value/ROI speaks for itself
- No worries that LHE institutions come and go
- No worries about current/future HE environment
 - Budget cuts: LHE will be invited to the table, not trimmed?

LHE does not need to scale

- Continue to help other HE institutions when asked
- Interested parties will find us

Some Reactive Choices to Scalability of LHE

REJECT: Tell me to shut up and go away (I'm simply wrong – once again)

ACCEPT: Limited penetration of LHE is not a bad thing (their loss)

IGNORE: Not really important (not our problem)

DISTORT: Find comfort in cognitive biases (availability bias, belief bias, sunk cost fallacy)

Some Proactive Choices to Scalability of LHE

READ/DISCUSS: *The Voltage Effect* (List, 2022)

CONFIRM: LHE works (e.g., an international Lean HE issue addressed by an international Lean HE “community of practice”)

- *Lean HE Benefits Realization: A Systematic Review*

ACT: Collectively problem solve (something we Lean-ers do very well)

PARTNER: With interested academics, aligned organizations, communication experts, etc. (join forces to tackle the challenges)

From Voltage Drops to Voltage Gains

IF/WHEN LHE addresses/resolves these five “voltage drop hurdles”

- List (2022) identifies 4 key “high-voltage scaling” strategies for LHE
 - ❖ More deeply within an HE institution
 - ❖ From 4% to 40% LHE institutions (or higher!)



But that’s a talk for another day ...

Thank You University of Melbourne!



- **Comments?**
- **Questions?**

wbalzer@bgsu.edu

www.leanhighereducation.com



The Scalability of Lean HE

Why Isn't This Great Idea Taking Off?

Virtual Presentation at the 2022 Lean HE International Conference

The University of Melbourne

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