

Lean Higher Education in Ohio:

*Complementary Approaches at Miami University
and Bowling Green State University for
State-Wide Implementation*

Lean HE Hub Conference

University of Waterloo, Ontario

September 10-11, 2015



Bill Balzer, BGSU

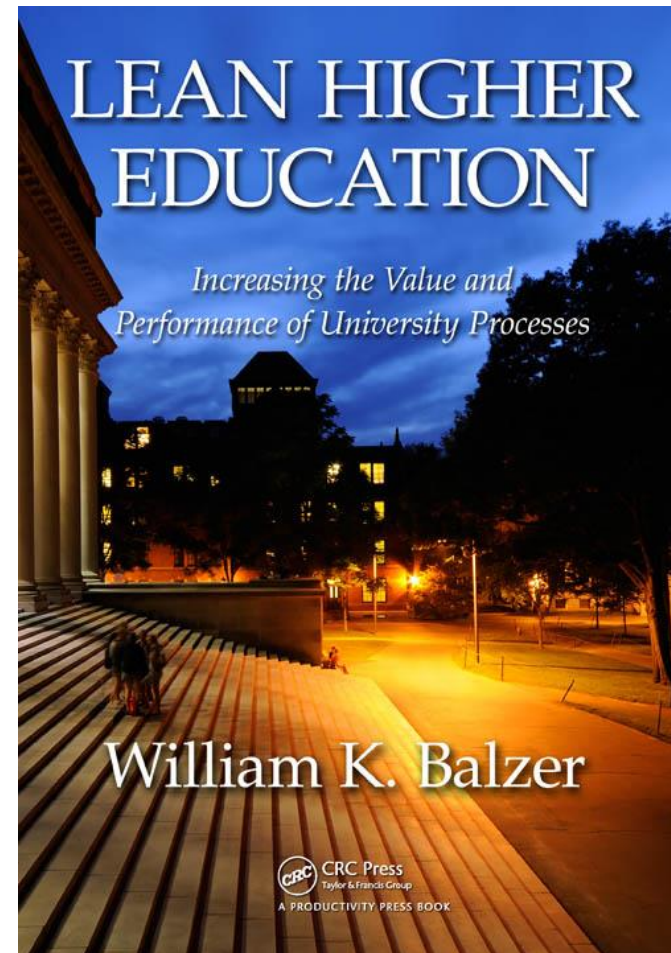
Tim Krehbiel and Al Ryan, Miami University

Goals for the Panel Discussion

- Describe two very different models for Lean Higher Education
 - Each adaptive to and successful in its environment
- Demonstrate opportunities for inter-institutional collaboration between the two complementary LHE models
 - Broad expertise and experiences enriches our institutions – and others
- Discuss the potential for collaboration to promote and support the expansion of LHE
 - Responding to state-wide demands (and not just Ohio!) on public higher education

The BGSU Story: “Opportunistic LHE”

- Invitation to join Lean workshops for area businesses
- Initial projects to “test” application of Lean in higher education
 - Student counseling services
 - Student health services
- Limited literature translating Lean to higher education



LHE@BGSU: Living the Life of Sisyphus

- Leading “opportunistic” projects across most divisions at BGSU
 - Academic Affairs
 - Student Affairs
 - Enrollment Management
 - Finance & Administration
 - Human Resources
 - University Advancement



BGSU Counseling Center: Scorecard Performance

	Before	After	% Improvement
Student waiting time until initial appointment (days)	5 days	< .1 (same day)	99.8%
Student waiting time from initial appointment to assignment to counselor (days)	16 days	< .1 (same day)	99.9%
Number of emergency counseling service interviews	356	213	40.2%
% “No Shows” for consultation & assessment interviews	20%	< 1%	95.0%
Number of students requesting counseling services	761	950	24.8% increase
Number of counseling staff	12 FT 1 PT	12 FT 1 PT	NO INCREASE

Administrative Staff Hiring: Scorecard Performance

Measure	Before	Projected After	Difference
Lead Time (beginning to end)	≈ 22 weeks	≈ 8 weeks	14 weeks (74% less time)
Number of Steps	87 steps	40 steps	47 steps (54% fewer)
% Value Added Steps in the Hiring Process	26%	57%	31%
Number of Forms	3	2	1 (33% fewer)
Processing Time			
• JAQ processing	20 - 40 days	2 – 11 days	20+ days saved
• Applicant review and hiring recommendation	4+ weeks	2 – 3 weeks	10+ days saved

Other BGSU LHE Projects

- **BGSU Counseling Center**
 - 21 day wait → 0 days (i.e., “walk in service”)
- **BGSU Student Health Services**
 - 1400 hours of student waiting time eliminated
- **BGSU Firelands Student Advising**
 - “Drop In” advising ↑ 6% Fall-to-Fall retention
- **BGSU International Wire Transfer Process**
 - 3 weeks → 3 days
- **BGSU Faculty Hiring**
 - Time from position approval to extending offer to candidate ↓ 50%

Acceptance of Local LHE Model & “Pirate Time:” Learning from Sisyphus and the 5 stage grief process

- Lack of supportive climate for LHE
 - Pockets of senior leadership support
 - Pockets of senior leadership resistance
 - Shifting priorities amid leadership transitions
- Identifying local projects
 - Entire process under control of supportive senior leader
 - Important project to one or more constituencies
 - Visibility and recognition for LHE champions and successes
- Voluntary project staffing
 - Faculty who teach Lean
 - Imported Lean skills through external leader hiring
 - Me!
- **Green shoots** appearing: Lean in BGSU’s 2015-2016 Strategic Plan!



Miami Story: “University-wide LHE”



For more about the Miami journey, see: Krehbiel, Miller and Ryan, “Lean Learning,” *Quality Progress*, February 2015, pp. 39-45.

LHE@Miami: Emerged from a Moment of Crisis

2008 Financial Downturn

\$30 Million in budget cuts including significant layoffs

David Creamer, VP for Finance and Business Services,
knew additional changes were needed:

“For Miami University to preserve its competitive advantage in a resource-constrained and rapidly-changing higher education marketplace, we needed strategies that would enable the University to restore service levels at the reduced staffing level, continuously improve service, and generate new ideas for resource creation and improvement into the future. I believed Lean strategies and tools could help us to build a culture that didn’t just focus on these outcomes in a crisis, but every day.”

In 2009, MU-Lean was born



MU-Lean Implementation Plan

1. Identify the Vision
2. Create a mission and define breakthrough objectives
3. Build an organizational structure
4. Develop training and certification
5. Build momentum in finance and business services
6. Position early adopters in early projects with impactful results
7. Expand to other areas of university and reach out to all employees
8. Expand internal training and certification
9. Create a sustainable culture of continuous improvement



➤ Phases 1-6 completed from 2009-2012, and progress is ongoing in phases 7-9.

Miami University 2020 Strategic Plan

Moments that Transform

Ensure vitality and sustainability by building a forward-looking, efficient, and caring culture that stimulates, recognizes, and rewards creativity, entrepreneurial thinking, and exemplary performance.

Unifying Goal

Promote a vibrant learning and discovery environment that produces extraordinary student and scholarly outcome

Vision

Miami will provide the best undergraduate experience in the nation, enhanced by superior, select graduate programs

How.....**Lean Principles**



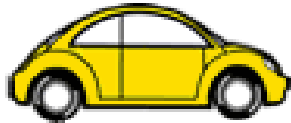
Lean Culture at Miami

- Current State

- Vision

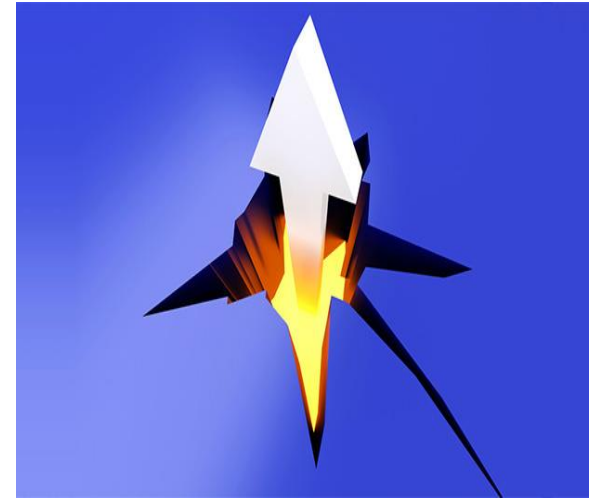


- Ensure that the Miami Student Experience is the most positive and best in University life in America
- Reduce and control expenses to meet University Goals without any adverse effect on the Miami Student's experience

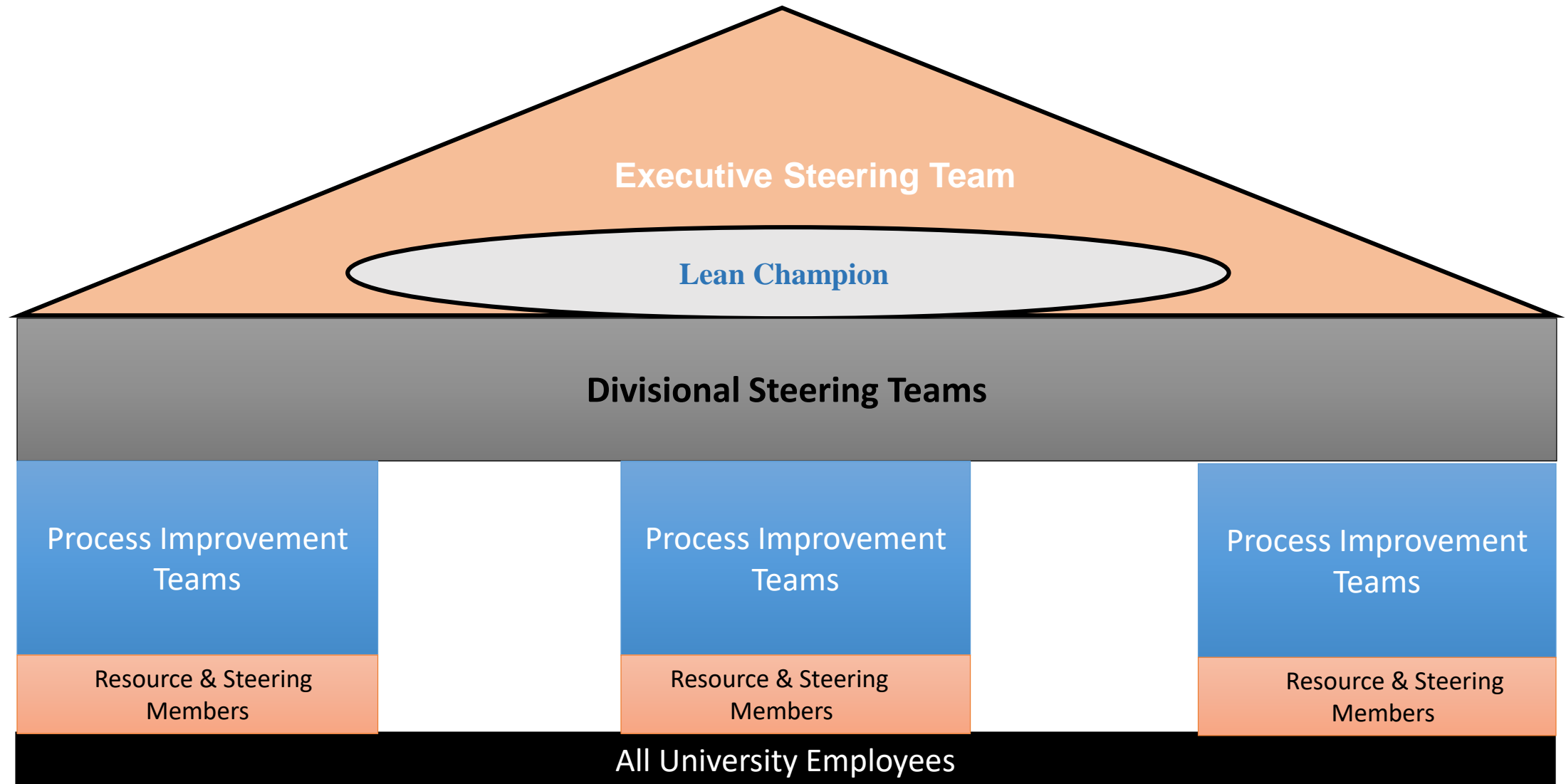


Lean Objectives at Miami

- **Job – One – Quality & Customer Service**
 - **Vision**
 - **Breakthrough Objectives**
 - Revenue
 - Productivity Improvement
 - Cost Reduction
 - Cost Avoidance
 - “Green” Initiative



Lean Organizational Structure



MU-Lean Results: FY2008-FY2015

- Reduction in Costs
- Improvement in Quality
- Improvement in Responsiveness to Customers
- Increased Sales to Customers
- Reduced Labor through Elimination of Wasted Time
- Continuous Improvement Journey – Expanded

MU-Lean Results as of 8/21/15

- Over 2000 Employees have received Lean Training
- 120 Employees are participating in MU-Lean Certification Program
- 36 Employees have Lean Certification (24-30 month program)
- 889 Total Projects
- 643 Complete
- 191 Active
- 55 Parking Lot
- \$32.6 Million in annual deliverables (Revenue, Cost Reduction/Avoidance)
- 35% Supported Miami's "Green" Initiative
- 72% Resulted in Productivity Improvements

Three Most Important Principles for Success and Sustainment

- Leadership & Support from the Top
- Structure
- Invest in your own people



“We must view our university through the lens of entrepreneurial thinking. The implementation of Lean methodologies begins to open doors to this type of thinking.”

Miami University President, Dr. David Hodge

LHE in Ohio: Models on a Continuum

LHE@BGSU

- Local
- Pockets of support
- Adaptable to divisional climate and leadership
- No centralized resources
- Pirate time
- Opportunistic

LHE@Miami

- University-wide
- Institutional support
- LHE is shaping climate and leadership
- Centralized office
- LHE is everyone's job
- Strategic

LHE as a State-Wide Opportunity in Ohio



On February 10, 2015, Governor John Kasich signed Executive Order 2015-01K establishing the “Ohio Task Force on Affordability and Efficiency in Higher Education”

“to review and recommend ways in which state-sponsored institutions of higher education ... can be more efficient, **offering an education of equal or higher quality while at the same time decreasing their costs.** This can be done only if institutions of higher education become more efficient and productive in the use of their assets, personnel and resources.”

The “Aha Moment:” Partnering Complementary Models to Leverage the Growth of LHE

- At BGSU and Miami



- Application: Sharing expertise, materials, consultation
 - LeanOHIO partner universities
 - Research: Collaborative studies and projects to advance knowledge
 - Teaching: Joint coursework and programs
- At other institutions of public higher education in Ohio
 - Raising awareness, understanding, and interest in LHE
 - Consultation and support from HE peers wherever you are on the continuum
 - Demonstrating public HE's mission to external constituencies
 - At other higher education institutions outside Ohio

Other “Continuum of LHE” Opportunities

- Plenary Session: A Tale of Three Cities
 - University of Aberdeen
 - University of Stirling
 - University of Strathclyde
- Panel Discussion: What Works Here?
 - University of Notre Dame
 - University of Michigan
 - Carleton University
- Network for Change and Continuous Improvement (NCCI)
 - Lean Community of Practice

Helping Others Launch LHE:

The Benefits of Exposure to a Continuum of LHE Options

- Exposure to multiple models and collaborators
 - Philosophical fit
 - Personal fit
- Recognition that there is no “one size fits all”
 - Matching your institutional readiness to the best model
 - Shaping your institutional readiness in preparation for choosing the model you want
- Established partners for campus visits, shared materials, advice & support
 - Pay it forward!

Opportunity: External Funding Support

- State Support
 - Executive
 - Legislative
- Lean Businesses & Organizations
- Foundations
- Alumni & Friends



Enterprise LHE in Ohio

- Across Ohio public higher education
 - 2 year public institutions
 - 4 year public institutions
- Across Ohio public HE “suppliers” and “customers”
 - Academic Suppliers: high school parents, advisors, and administrators
 - Academic Customers: employers, Ohio Dept of HE, legislators
 - Support suppliers: product and service vendors
- Across Ohio education
 - Private higher education
 - Ohio K-12 school districts and Educational Services Centers



Enterprise LHE: World Domination!

National and international LHE collaboratives:

- **Sharing expertise, resources, data, etc.**
 - **Lean HE Hub Consortium**
 - **U Waterloo Consortium**

Audience Thoughts and Reactions

- What are YOUR challenges and opportunities for greater LHE collaboration?
- Where are YOU on the LHE Local – Enterprise continuum?
 - Is it where you want to be?
 - Would it be helpful knowing where other schools are on the continuum?
- How are YOU providing secure funding for LHE?
 - Is any of your funding external?
- Are YOU looking for collaborators?
 - What do you need from a collaborator? What do you bring?
- How can we get started?