Process Palooza: UC San Diego LEANing Toward Success

Mojgan A. Amini, MS CS, Lean Six Sigma Black Belt
Director, Process Management & Continuous Improvement
Information Technology Services, University of California San Diego
858-534-1023  |  mojgan@ucsd.edu

Project Team - Core Contributors

Vice Chancellor CFO
Mojgan Amini, IT Services – Process Palooza Lead
Lynn Underwood, IT Services – Process Palooza Lead
Vince Kellen, PhD, Campus CIO
Bob Neuhard, Exec Director, Operational Strategic Initiatives (OSI)
Ted Johnson, Chief Procurement Officer – Lean Bench steering
Ashley Gambhir, Sr. Director, OSI – Lean Bench steering
Allorah Pradenas, Program Director, OSI – Lean Six Sigma training
Matt Helton, OSI – Lean Six Sigma training
Bradley Sollenberger, OSI – BECoP steering
Monique Pascucci, Project Analyst – BECoP steering
Prachi Raheja, IT Services – Lean Bench manager

Vice Chancellor Health Sciences
Will Ford, Director UCSD Health - Lean Bench steering

Vice Chancellor Student Affairs
Heather Belk, Associated Students Administration – Process Palooza
Christian Walker, Associated Students Administration – Process Palooza

Executive Vice Chancellor Academic Affairs
Ahren Crickard, EVC office - BECoP Chair, Lean Bench steering
Shawn Munro, Jacobs School of Engineering - Lean Bench manager
Cynthia Hanson UCSD Extension – Process Palooza Lead
Angela Cook, UCSD Extension – Process Palooza Lead
Tracy O’Rourke, UCSD Extension – Lean Six Sigma Green Belt instructor
Ric Van der Linden, UCSD Extension –Lean Six Sigma Black Belt instructor

Vice Chancellor Resource Management & Planning
Eliud Escobedo, Resource Management Planning
Lawana Richmond, Parking & Transportation - Process Palooza

Lean Six Sigma Movement Engulfs UC San Diego
This is not just a project, it’s a movement! What started as a unique event to focus on business process improvement - Process Palooza - spawned a university-wide embrace of continuous improvement and business excellence. The first-of-its-kind event hit a max capacity of 500 participants, resulted in 30 practical improvement ideas across two large campus processes, engaged all VC areas, and launched two core initiatives to sustain this mindset shift: Lean Bench and Business Excellence Community of Practice.
Backstory: Be Efficient or Go Home
Goal #5 of UC San Diego’s Strategic Plan is: Creating an agile, sustainable, and supportive infrastructure by ensuring a dedication to service, people, and financial stewardship. Various forms of the word “efficient” are used 11 times to further explain the goal.

Translation: Be nimble, do more with less. For IT Services, that means any savings in time or money gets directly reinvested back to the university’s core mission.

“Continuous improvement” is the mindset, and Lean Six Sigma (LSS) is the way to do it. LSS is all about eliminating waste and reducing defects. The practical effect is streamlining and optimizing to improve quality. The principles apply to all facets of campus: academic units, medical center, research administration. There are over 1,500 certified LSS practitioners at UC San Diego who have earned Yellow (beginner), Green (intermediate) and Black (expert) belts through the Office of Strategic Initiatives (OSI) and UC San Diego Extension.

Meanwhile...starting in 2017, momentum was building on multiple fronts:
• A handful of people with interests in change management, continuous improvement and project management were meeting informally to grapple with merging all three concepts.
• The university was in the beginning phases of a major ERP effort with process optimization at its core.
• Leadership from IT Services, UC San Diego Extension and the Office of Strategic Initiatives (OSI) knew employees were getting LSS training and wanted to show value to campus executives.

We had the skillset, the interest and need...but something was missing: A way to bring LSS practitioners together and harness the collective knowledge.

Process Palooza: Continuous Improvement Competition and Conference
What’s the best way to bring everyone together? Conference? Workshop? Competition? In the name of efficiency, we decided to do them all at once. Thus was born Process Palooza!

Everyone made the invite list: faculty, students, researchers, staff, LSS practitioners, non-practitioners and UC San Diego extension LSS alumni. Conference goals were twofold:
• Provide each attendee an opportunity to experience, learn about and grow LSS practices across campus.
• Bring together LSS enthusiasts and deploy their collective knowledge in a structured, impactful way.

Process Palooza was truly a three-in-one event – after all, it was put on by people specializing in efficiencies!
Components included:
1. Process improvement competition – aka, The Great LSS Race
2. LSS Learning tracks for everyone
3. Networking and community building

The Great LSS Race
A key goal was to show process improvement in action. And what better way to do that than with a competition? Attendees with at least a Yellow Belt certification were eligible, and there were enough to make six teams of six. The idea was to put their skills to the test by analyzing a messed-up process and have judges evaluate just how significantly they improved it.

Here’s what sets the competition element apart: We used actual campus business processes.
Two units graciously served up real processes, flaws and all:

- Associated Students Student Employee Travel Requests
- Transportation Services New Employee Commute Options Process

From the opening bell it was a true race against the clock. Over the course of five hours the teams filled whiteboards with fishbone diagrams, value stream maps and other analysis techniques. At the end, each team gave a 10-minute talk explaining how its ideas saved time and money for the respective units. In fact, the only inefficient part of the day was the extended time it took judges to make a tough call on announcing winners!

By day’s end, teams had identified a total of 30 discrete process improvement suggestions for Associated Students and Transportation Services. The respective departments also went and implemented the teams’ recommendations. See the Outcome section for the full impact!

Conference: Learning, Sharing, Inspiring
Process Palooza component #2 consisted of a traditional set of breakout workshops, covering everything from LSS basics (in a quickie White belt session) to use cases showing how LSS is being applied at UC San Diego. Meanwhile, a series of posters showcased university efficiency efforts by visually displaying problems, the LSS effort, outcome and value.

Connecting: Networking, Recruiting and More
Throughout the day, opportunities for networking and making connections were in abundance, including networking lounges and booths for departments and workgroups to either showcase their projects or ask for help – including the aforementioned community of practice and Lean Bench.

Timeframe: Journey to Process Palooza
In some ways Process Palooza was years in the making, with personnel undergoing LSS training as far back as 2016. A tipping point was reached in July 2017 when we decided to merge all the concurrent efforts described above into an all-encompassing event.

Originally, Process Palooza was conceived as just a one-day event. But as we’ll describe in the Outcome section, the learnings, impacts and results live on in multiple forms.
Outcome: From Event to Movement
What started as a day-long event fueled a university-wide mindset shift toward continuous improvement and business excellence. Process Palooza inspired multiple campus programs to not just carry forward the movement, but to continue making an impact.

Business Excellence Community of Practice (BECoP)
Process Palooza turned out to be the ideal incubator of our unique Business Excellence Community of Practice (BECoP). Open to all, BECoP addresses the intersection of change management, continuous improvement and project management. Members come together to share best practices, learn from each other and look for opportunities to strategically deploy skills. Process Palooza served as a central point to both fully explain the concept of BECoP and actively recruit. Since Process Palooza, a formal board of directors has been formed, 130 people have joined up and six campus-wide workshops have been conducted. Learn more: becop.ucsd.edu

Lean Bench
Process Palooza was also key in populating our Lean Bench. The “Lean” is from Lean Six Sigma and the Bench refers to a roster of 12 process improvement experts. A highly selective application process resulted in the identification of these 12 LSS experts. Lean Bench members are available to assist departments in need by applying their expertise to optimize clunky or inefficient campus processes. The concept of a bench means that members keep their normal positions in their home department. Through interdepartmental consulting agreements, they analyze processes with an objective, outside perspective. Learn more: leanbench.ucsd.edu

The Lean Bench has already been deployed to provide process improvement reviews to multiple large ERP-renewal efforts, including Research Administration, Financial Services, Academic Personnel, with several others waiting in the wings. These ERP-renewal efforts are equal parts process improvement and technology upgrade – there’s no reason to apply new tech solutions to bad processes.

Real Processes, Real Results
The competition element of Process Palooza was fun, but also impactful for the departments that put their processes through extreme scrutiny. They went and implemented just some of the solutions, and realized the following results:

- Associated Students travel request process: $96,000 savings, 41% reduction in processing time, 50% reduction of rework, 50% reduction of advising time, increased customer satisfaction by 80%, increased process understanding by 100%.
- Transportation Services new employee commute: By implementing only a small number of improvements, achieved $105,000 in labor savings, 30% reduction of in-person procession. Full implementation of improvements slated for Fall 2018.

Overall Success Factors

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<tr>
<th>Goal</th>
<th>Results</th>
<th>Outcome</th>
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<tbody>
<tr>
<td>Attract 250 attendees from across the campus and health systems</td>
<td>Attracted 500 attendees from across the University. About 50% were totally new to Lean Six Sigma</td>
<td>✔️ ✔️ Exceeded</td>
</tr>
<tr>
<td>Review and improve 2 campus business processes.</td>
<td>Departments that had their processes analyzed were able to implement suggestions and come away with documented and measurable results. 30 practical improvement ideas were delivered. Process improvement changes were implemented within 3-6 months.</td>
<td>✔️ Met</td>
</tr>
<tr>
<td>Provide quality experience and introduction to Lean Six Sigma methodology</td>
<td>75% attendees rated as very good to excellent. All tutorials and learning tracks were at maximum capacity with content being projected to over-flow rooms.</td>
<td>✔️ Met</td>
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Executive-level support and endorsements

Executive Vice Chancellor for Academic Affairs appeared in-person to deliver a welcome address and kick-off the event. Vice Chancellors and AVCs were either present or offered support through meet-ups and prizes. The entire body of VCs support the initiative through a key IT Governance Committee.

One-time campus event

Received endorsement and support for recurring annual event. Look out for Process Palooza 2018!

Promote interest and awareness across UC San Diego

Word spread like wildfire beyond UC San Diego. Other campuses are interested in putting on their own Process Palooza. Therefore, we’re in the midst of putting together our “Palooza in a Box” concept with guides and templates! In addition, we’ve been invited to present at 10+ national conferences on the topic.

UC San Diego Business Excellence Community of Practice. A cross-departmental community of practice was formed to analyze the intersection of change management, continuous improvement and project management.

UC San Diego Lean Bench Program. A “Lean Bench” of Lean Six Sigma experts was formed to apply process improvement techniques to a major ERP effort.

### Lean Six Sigma Training and Quantifiable Savings

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<thead>
<tr>
<th>Lean Six Sigma Certifications</th>
<th>Quantitative Savings in $Millions since 2016</th>
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<tbody>
<tr>
<td>IT Services</td>
<td>2.3</td>
</tr>
<tr>
<td>UC San Diego</td>
<td>6.1</td>
</tr>
<tr>
<td>San Diego community</td>
<td>58.1</td>
</tr>
<tr>
<td>Inclusive of Yellow, Green, Black Belts</td>
<td>Soft and hard savings based on Lean Six Sigma projects</td>
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### Additional Resources

If you’re going to click on one thing, just watch this 4-minute video:

[Process Palooza: UC San Diego LEANing Toward Success – Larry L. Sautter Proposal 2018](https://www.youtube.com/embed/ZtYcMr02rJY?rel=0&showinfo=0)

**Other links:**
- Process Palooza website: [http://processpalooza.ucsd.edu](http://processpalooza.ucsd.edu)
- Lean Bench: [http://leanbench.ucsd.edu](http://leanbench.ucsd.edu)
- BECoP: [http://becop.ucsd.edu](http://becop.ucsd.edu)
- LSS Info Page: [http://leansixsigma.ucsd.edu](http://leansixsigma.ucsd.edu)
- Operational Strategic Initiatives: [http://osi.ucsd.edu](http://osi.ucsd.edu)
- UCSD Extension: [https://extension.ucsd.edu/step-up](https://extension.ucsd.edu/step-up)
- Extension Article: [Lean Six Sigma Produces Results for UC San Diego](https://extension.ucsd.edu/step-up)
- UC IT Blog: [Process Palooza Lean Six Sigma in Action at UC San Diego](https://extension.ucsd.edu/step-up)
- 4-minute Recap Video: [Process Palooza video](https://www.youtube.com/embed/ZtYcMr02rJY?rel=0&showinfo=0)