LEAN IN

GOVERNMENT

PRESENTED BY

HARRISBURG UNIVERSITY
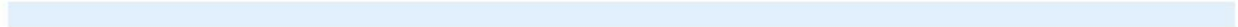OF SCIENCE AND TECHNOLOGY

LEAN IN GOVERNMENT 2022

HELD VIRTUALLY ON FEBRUARY 16 AND 17, 2022.

Lean in Government 2022 Schedule

Day 1 | February 16, 2022

9:00 – 9:00 AM: Opening Remarks

9:30 – 10:15 AM: Results PA Panel Discussion
Join us as we leverage the collective experience of commonwealth change leaders as they share best practices, challenges, and lessons learned from implementing the Results PA framework in their agencies. Results PA is a powerful performance management tool, designed to support the Lean plan-do-check-act cycle while laser focusing on process improvement efforts. During this panel, we will explore how Results PA connects the daily work of front-line employees with the greater mission of their organization, helps them identify and see the value in developing metrics, and empowers them to use data to inform business decisions.

Speakers:
- Stephanie Cole, Special Assistant to the Secretary, Pennsylvania Department of Aging
- Robert Carr, Director of Business Transformation, Pennsylvania Department of General Services
- JoAnn Saponsky, Project Manager, Pennsylvania Department of Revenue
- Dale Simpson, Deputy Secretary for Pennsylvania Department of Revenue

10:15 – 10:30 AM: Break

10:30 – 11:15 AM: Breakout Sessions 1

Track 1: Human-Centered
From Surviving to Thriving: Cultivating Equity and Inclusion through a Trauma Informed Lens in the Workplace
Diversity, equity, and inclusion has become a crucial and transformative element within society, and most importantly in the workplace. As the Commonwealth of Pennsylvania continues to lay the foundation for a healthy government, it is essential for us to lean into 21st century leadership and embrace inclusive excellence. This presentation will focus on utilizing a trauma informed approach to DEI in workplace to ensure sustainability and create a pathway for restorative justice, while challenging oppressive structures and systemic issues in state government.

Speakers:
- Venus Ricks, Director of Diversity, Equity, and Inclusion, Office of Advocacy & Reform
- TaLisa Ramos, Director of DEI Education, Office of Advocacy & Reform

Track 2: Process
<u>Creating a Culture of Lean</u>
This session will introduce participants to Lean Six Sigma and how it can positively impact workplace culture. Participants will hear about Lean methodology and tools that can assist them in making processes simpler, faster, better and less costly for employees and external customers.

Speaker:
- Hannah Thomas, Systems Improvement Consultant, LEANOhio

Track 3: Management Systems
<u>Scrum: A Repeatable Process to Create High-Performing Team</u>
Tackling challenges effectively and sustainably requires a high-performing team. But how do you create one? Is there a repeatable process we can use that is proven to work with literally thousands of teams? In fact, there is. The research for this particular method, called Scrum, began in 1983 when a former West Point graduate became frustrated with the poor results he saw from most teams he worked with. Scrum was heavily influenced by lean, so they work effectively together. And Scrum has been applied to all kinds of teams, including those in Government, customer service, education, health care, marketing, and all kinds of physical and software products. We have applied Scrum to Government programs over the last 17 years. Learn about the challenges and how to apply those lessons learned to build your own high-performing team.

Speaker
- Dave Witkin, Managing Principal, Packaged Agile

11:15 – 11:30 AM: Break

11:30 – 12:30 PM: Keynote
<u>Healthy Government Framework: a Human-Centered Mindset and Culture</u>
What does it take to create a commonwealth government where customers are satisfied, and employees can truly thrive? It takes a commitment to the keystone of the Healthy Government Framework: a human-centered mindset and culture. In this keynote talk, learn from Renée Smith, the co-creator of Healthy Government Framework, why it is essential to put people at the heart of the organization and how to do that each day. Learn the origins and application of the framework, and how creating a more human workplace can help teams deliver greater value to Pennsylvanians. As a behavioral scientist and leader, Renée's primary research opens a bold new pathway to lean continuous improvement and effective workplaces with happy, loyal employees. Learn the five things to avoid and the three things to uphold to create a human workplace. Understand the role of accountability in a human-centered culture. Come away inspired and holding the "key" to supporting all the other elements of a healthy, effective government.

Speaker:
- Renee Smith, MSOD, LSSBB, Founder and CEO, A Human Workplace

12:30 – 1:30 PM: Lunch Break

1:30 – 2:15 PM: Breakout Sessions 2

Track 1: Purpose
Implementing the Vision
In today's era of fast-paced, ever-changing workplaces, having a vision and common goals is even more important than ever. Just an important, though, is achieving those goals. Do you know where you are going? Is your team on track to reach that vision? This presentation will look at the foundational components of a vision, strategy, and strategic goals and the importance of each. We'll then present an approach for linking individual projects to those goals, so the organization is on track for achieving its strategy.
Speaker: David Fulton, M.S., PMP, ITIL v.3, Consultant, Momentum

Track 2: Process
Using Tactical Lean Tools to Identify Organizational Opportunities and Develop a Long-Term Implementation Strategy
The Office of Vocational Rehabilitation of Pennsylvania (OVR) conducted an organizational-wide evaluation to understand several their processes and systems more clearly. The main Lean tools used during this evaluation were Process Mapping and SWOT Analysis. The most critical component of this evaluation process was the involvement and engagement of the OVR workforce. Interviews were conducted with members of the Central Office, leaders of individual District Offices, as well as employees at the Counselor level. Given the remote nature of the current work environment, conducting an effective Gemba evaluation can be difficult. OVR utilized a robust collaborative software and process to replicate an in-person mapping activity as closely as possible. This resulted in maximizing employee engagement resulting in a more detailed and accurate evaluation. While the Process Mapping and SWOT Analysis contain extensive data, OVR is only now prepared to begin developing their implementation plan. The implementation plan will include a combination of both strategic and tactical activities. OVR is effectively following the traditional PDCA (Plan, Do, Check, Act) cycle for improvement. Most organizations mistakenly rush through the Plan phase to begin "Doing". OVR has maintained their own process improvement discipline to methodically transition through the PDCA cycle.

Speakers:
- Shannon Austin, Executive Director, Office of Vocational Rehabilitation
- Robert Klym, President, Operational Performance Solutions

Track 3: Capability
Cultivating Lean Leaders: How Workforce Promotion & Recognition Systems Contribute to Creating the Culture for Lean to Thrive
Traditional workforce recognition and promotion programs focus solely on individual members' contributions and accomplishments. It certainly makes sense that employees who perform well at their jobs are probably going to do well at the next higher level. Organizations use a performance measures or other type of accessible data points to evaluate employee performance to identify top performers ready for increased responsibility and recognition. Conversely, teamworking skills such as collaboration, problem-solving, communication, listening, and countless others are critical to creating a lean environment. None of which are currently included in many workforce recognition and promotion programs built around individual employee performance measures. What if promotion programs were designed to reward those employees that bring teams and people together and how much they develop those employees around them? Imagine the impact if individual performance was rated by commitment to fostering and developing change, coaching and developing other leaders, and facilitating process improvement? This discussion will explore how small adjustments in the definition and design of today's workforce promotion and recognition programs can reward behaviors necessary to create the environment for lean to thrive.

Speaker:
- Kathleen Fabrizi, MSLBE, MMOAS, PMP, CLSSMBB, CHEP, Director of Continuous Process Improvement, Innovation, & Leadership, PA National Guard, Instructor of Project & Supply Chain Management, The Pennsylvania State University, PA National Guard

2:15 – 2:30 PM: Break

2:30-3:15 PM: Breakout Session 3

Track 1: Purpose
Job, Career, or Calling -- Connecting Employees to Purpose in a Large Organization
Connecting employees to an organization's purpose is critical to sustainable success for any improvement or change effort. Naturally, as leaders in our organizations, our intuition is to communicate—or over-communicate—the vision and mission to everyone to ensure they know what the words say, what the organization is trying to do, and what their role is in that outcome. However, our intuitions fail us by not understanding the perspectives of our workforce and how they perceive their role and contributions against the patterns and structures they see every day. In truth, most will never be in a position to connect daily tasks to the overarching mission, but that's okay; they don't have to for the organization and all employees to flourish. This session will discuss one of the natural divisions of perspective in the workforce. By the end, we will learn how to articulate the most impactful connections to each employee's perspective, obtaining buy-in and even active cooperation with organizational improvement and lean transformations. This isn't a lecture. If you bring your questions, you'll

leave with a path toward connecting yourself and your employees to your organization's purpose. Value to Attendees: Attendees will leave this session with strategies to gain organizational buy-in for organizational transformation initiatives from the different perspective groups found throughout the workforce.

Speaker:
- Philip Mann, PhD, PMP, Assistant Professor of Organization & Management, Harrisburg University of Science & Technology

Track 2: Process
Jira and Kanbanize: Clash of the Titans
Covid-19 changed the game, making remote work and distributed team members the norm. I think we all sense that something fundamental has changed in the nature of work, and many of these changes will persist even after the pandemic. Like it or not, whiteboards and sticky notes can no longer cut it. We have to use Agile tools. So... which one? In this talk Craeg will do an in-depth walkthrough of two leading Agile tools: Atlassian Jira and Kanbanize. He will review the philosophy of each tool, and then walk through a fully featured simulation, complete with sample projects, plugins, and project configurations, that show off the best that each tool has to offer. Atlassian Jira is a "developer's tool," and this heritage shows through clearly in the way it is set up, how the pieces fit together, and the problems it tries to solve. But this is really only a small part of the Jira story. The Jira plugin marketplace has exploded in popularity, with hundreds of high-quality plugins that extend Jira in all sorts of interesting ways. Kanbanize is the market leader among a set of up-and-coming Kanban tools including Kaiten, Swift Kanban, Kanban Zone, and LeanKit. Craeg will explore how Jira supports both Kanban and Scrum at the team level, as well as scaling beyond the team level. In contrast to Jira, Kanbanize offers a "batteries included" approach that tightly integrates features in a unique and highly usable interface. Craeg will explore the areas of overlap and the unique strengths of each tool. In the end, both are highly capable, flexible, and powerful enough to support even the largest of organizations. But...in the end there can be only one. Come to see the results of this legendary battle!
Speaker:
- Craeg Strong, KCP, SPC, ICP-ACC, CTO, Ariel Partners

Track 3: Human-Centered
Connecting Pockets of Passion: Establishing Brave Conversations Around Diversity, Equity, and Inclusion
Governor Wolf tasked all commonwealth employees under his jurisdiction with being leaders in diversity, equity, and inclusion. Our panelists took the charge to heart by connecting their passions for DEI through the creation of brave spaces in which to have uncomfortable and difficult conversations. From hosting biweekly EACH is Important Conversations (Exploring All Complexities of Humanity), to bringing leaders together to discuss growth in the DEI space, to hosting podcasts helping those along their DEI journey, to creating a commonwealth-wide antiracism book club, these strong women have pushed the conversations of DEI forward. They

will discuss their roadblocks, keys to success, and their vision for a more inclusive commonwealth staff.

Speakers:

- Mel Kesler, Director of Transformation, PA Department of Community and Economic Development
- Claire Osborne, Director of Business Transformation, PA Department of General Services
- Hattie McCarter, Equity Management Program Coordinator, PA Department of General Services
- Beth Andreoli, Director of Transformation, Governor's Office of Performance through Excellence

3:15- 3:30 PM: Break

3:30 – 4:15 PM: Breakout Sessions 4

Track 1: Human-Centered
Avoiding a Weak Foundation: People as the Base of Your Lean Implementation
Implementing Lean principles is the latest public sector movement and involves new lean concepts, new lean planning, and new lean tools. But even the best implementation of these three lean components will fail without a fourth component; one that sets the proper foundation: a lean culture. During this presentation we'll: •Discuss why the office culture is imperative to successful lean implementations •Encourage participants to share failure and success stories and share our own •Provide and solicit tips and techniques on establishing, supporting, and growing the foundational culture needed for successful Lean implementation •Challenge participants to identify the role and importance of cultural leaders and cultural enablers and their impact on continuous improvement, enterprise alignment, and results. •Identify methods to address threats to a burgeoning Lean culture and ways to establish practices to ensure culture continuity.

Speakers:
- Nancy Boito, PMP, M.Ed., Manager, Mazars
- Heather Carman, Manager, Mazars

Track 2: Capability
The Front-Line Supervisor and Key Actions to Use in Creating Lean Success
Leadership has been recognized as an integral part of a successful Lean transformation. Leaders are people others follow, and while there is a general understanding of Lean leadership behaviors in private sector organizations, do these same leadership behaviors translate to public sector organizations. The frontline supervisor in a Lean transformation is critical to its success. The role of the frontline supervisor is complex requiring a balance between the

interests of higher levels of management and the work units they lead. The front-line supervisor is also a key communicator in interpreting and implementing the goals and objectives of the Lean effort. This interactive session will explore the key traits necessary for front line supervisors to build successful lean efforts. This program will share the results of in-depth interviews with front-line supervisors from seven commonwealth agencies. The participants will discover the several leadership behaviors that front line supervisors exhibit to engage their direct reports in a successful Lean transformation, and will takeaway practices, that can be implemented the next day.

Speaker:
- Joe Deklinski, DBA, Corporate Faculty, Harrisburg University of Science & Technology

Day 2 | February 17, 2022

9:00 – 9:30 AM: Opening Remarks

9:30 – 10:15 AM: Commonwealth Leadership Panel
Join Pennsylvania's Secretaries of Conservation and Natural Resources, General Services, Labor & Industry, and Transportation as they discuss insights from their agencies' journey toward healthy government, the role of sponsorship in promoting sustainable transformation, and real-world examples of improvements in employee experience and state government services. Attendees will learn strategies for leading organizational change and gain a deeper understanding of how Lean is practiced in four commonwealth agencies.

Speakers:
- Secretary Curt Topper, Pennsylvania Department of General Services
- Secretary Jennifer Berrier, Pennsylvania Department of Labor and Industry
- Secretary Cindy Dunn, Pennsylvania Department of Department of Conservation & Natural Resources
- Secretary Yassmin Gramian, Pennsylvania Department of Transportation

10:15 – 10:30 AM: Break

10:30 – 11:15 AM: Breakout Sessions 1

Track 1: Human-Centered
Integrating Humanness into the Department of Revenue's Approach
Bringing your whole self to work sounds like a great concept, but how do you start to introduce humanness into a department whose main focus is numbers and money? And how do you become more considerate of your customers when most of them are not happy with the

answers you have to give them? Join the Department of Revenue as we discuss how we have begun to put the "human" in how we interact with our employees as well as our customers.

Speakers:
- Dorty Theis, Director of Transformation, Pennsylvania Department of Revenue
- Chantel Hardaway, Administrative Officer, Pennsylvania Department of Revenue

Track 2: Process
Impacting Lives Through Government Process Reengineering
Systems and service improvements and reengineering in the private sector are often triggered by market competition and profit; elements that aren't obvious to the casual observer of the public sector. The goal of this presentation is to discuss what triggers process improvements and reengineering in the public sector, identify ways to implement them, and discuss how these improvements and reengineering efforts affect agency personnel, private sector businesses, and citizens of the commonwealth. During this session we'll:
- Consider what triggers government process redesign efforts.
- Challenge participants to thoroughly identify the factors to consider when thinking about improving or reengineering a process.
- Encourage participants to discuss how a comprehensive redesign methodology impacts those involved with the process.
- Urge participants to discuss how redesigned public-facing and non-public facing processes are currently affecting agency personnel, private sector businesses, and citizens of the commonwealth.

Speakers:
- Nancy Boito, Manager, Mazars
- Heather Carman, PMP, ITILv3, Manager, Mazars

Track 3: Capability
Pittsburgh: A Leaner City Every Year
How Pittsburgh is rising up to the challenges by empowering its employees with lean tool and implementing the innovative fabric in every aspect of their work.

Speakers:
- Mantra Sutariya, Process Improvement Engineer, City of Pittsburgh
- Christopher Mitchell, Anti-Litter Specialist, Project Coordinator, City of Pittsburgh

11:15 – 11:30 AM: Break

11:30 – 12:30 PM: Keynote
Level Three Government: Lean as the Path to Social Good

State government has long struggled with what might otherwise be a natural operational maturation -- because of the wholesale leadership changes that occur from one administration to the next. All too frequently new governors will not only change out agency leadership, but they will also have all visible programs of the previous administration shut down including such critical things as scorecards that report state performance, Lean efforts, and leadership development programs. There are three levels of operating maturity to be explored: Level One, where a state's operations are reaction driven -- driven by crisis, problem, or the issue of the day. States are lifted into Level Two by explicit and broad governor's goals and measurable targets, establishing business reviews, cross-agency breakthroughs, next-generation leadership development programs, and comprehensive efforts to engage all employees in improving their processes. When Level Two matures in a state Level Three becomes possible. Level Three is social-good driven and leverages the disciplines, methods, and tools of Level Two to address such complex social challenges as teenage suicide, opioid overdose deaths, child maltreatment, homelessness, racial inequality, and global warming. Lean has the potential to go way beyond state operations because its concepts, methods and tools teach us to work together using approaches with far greater impact.

Speaker
- John Bernard, President, John M. Bernard, LLC

12:30 – 1:30 PM: Lunch Break

1:30 – 2:15 PM: Breakout Sessions 2

Track 1: Purpose
Highly Effective Leadership Begins with Self-Awareness
Optimal team performance is founded upon highly effective leadership. To be a highly effective leader, one must cultivate mindful self-awareness and the qualities of emotional and social intelligence that underlie servant leadership. One becomes a tuning fork for the team. In this presentation we define the intelligences and servant leadership and explore, mindful self-awareness and the way to cultivate it. Attendees will practice mindfulness meditation and learn how mindfulness, a practical realistic perspective, and courage combine to enable highly effective leadership.

Speaker
- George Pitagorsky, Coach & Consultant, Self-Aware Living

Track 2: Process
PA Department of Revenue's RPA Journey from POC to Pilot
Starting in 2019, DOR partnered with KPMG to develop a Proof of Concept to provide an example of RPA technology and the benefits it could provide to a large, complex organization like ours. Later that same year, an Opportunity Assessment was conducted to look at the various business use cases where a lot of human capital is required to perform relatively easy,

mundane tasks that sometimes prevent us from getting to those value-added processes that are critical to the success of our business. In early 2020 we started Operationalization, which established a governance structure (or path to production) that prioritizes automation project requests and coordinates with IT resources to develop, test, and deploy bots to production. After a long pause to the project due to the pandemic, we restarted in late 2020. And after another year of hard work RITA (Revenue's Innovative Task Automation) was born! The first automation put into production in August of 2021 was to help with the Administrative Penalty Abatement process.

Speakers:
- James Yurko, PMP, ITIL, v3, TOGAF, Director, KPMG
- Torrence Miller, Senior Analyst, PA Department of Revenue

Track 3: Human-Centered

Ministry of Transportation Lean into Design Thinking

'People don't care how much you know until they know how much you care' - Teddy Roosevelt Have you ever wondered about how to bridge the rigor of Lean and the people-centric approach of Design Thinking in government? The Ministry of Transportation is working to modernize the way service is being delivered to the citizens of Ontario. One of their exciting initiatives is to improve the truck driver experience when applying for a new Commercial Vehicle Operators Registration (CVOR). The team applied an unique approach of Design Thinking tools and principles to empathize with carriers and Lean tools to root out waste and non-value-added activities throughout the process. Through this unique hybrid approach, the team is able to develop a deep understanding of the truck driver experience and reduce rework. From User Journey Map to Values Stream Map, learn from the team's journey on how they developed strategies to help reduce 80% of the rework for the new applications, while identifying effective counter measures to reduce truck drivers' frustrations!

Speakers:
- Trisha Ziemianin, Senior Process Improvement Analyst, Ontario Public Service
- Joyce Lee, Senior Process Improvement Analyst, Ontario Public Service

2:15 – 2:30 PM: Break

2:30-3:15 PM: Breakout Sessions 3

Track 1: Purpose

Leading an Effective LEAN Culture

Developing a culture where LEAN principles can flourish is a challenging, but ultimately rewarding undertaking. Why challenging? Because to maximize LEAN principles, you must first ensure that everyone throughout the organization masters and utilizes three critical non-cognitive skills - Honesty, Trust, and Judgment. These skills are the fundamental principles necessary to ensure everyone is engaged and empowered. No easy lift for sure, but ultimately the success of LEAN isn't about the process, it's about the people. Therefore, we are going to discuss why these skills are so critical and how to ensure they are being valued and developed. Also, when considering LEANing business processes, it is critical that everyone's focus remain

on the mission. If not, the needs of the customer will become nothing more than an afterthought. To ensure mission focus there are two perils that one must avoid when considering LEANing. These are the Efficiency Paradox and the Zealot's Temptation. Leaders and followers who do not take heed of these threats will fail regardless of their best efforts or good intentions. Therefore, we will examine why these hazards are so insidious and how to ensure they do not lead to practices that are detrimental to the overall wellbeing of the commonwealth.

Speaker:
- John Phillips, Executive Consultant, BGL Strategies

Track 2: Management Systems

A Journey with Genesys Reporting

Follow us on our journey of how a Lean Six Sigma project on a paper report inspired the Department of Revenue's Customer Experience Center to come up with a new reporting process that is more transparent and flexible to meet management and supervisor needs. Utilizing the tools we already had, we were able to transform our reporting process and incorporate data visualization to quickly see data trends and make decisions.

Speakers:
- Meghan Rooney, Revenue Research Analyst, Pennsylvania Department of Revenue
- Chantel Hardaway, Administrative Officer, Pennsylvania Department of Revenue

Track 3: Process

Stages of Implementing Internal and External Change for the Ryan White Part B Program

This presentation will outline the steps taken, beginning in 2020, to implement a systematic change in the way data outcomes are collected and analyzed for the Pennsylvania Ryan White Part B Program. The Health Resources and Services Administration's Ryan White HIV/AIDS Program provides a comprehensive system of HIV primary medical care, essential support services, and medications for low-income persons living with HIV/AIDS (PLWH). The program funds grants to states, cities, counties, and local community-based organizations to provide care and treatment services to PLWH to improve health outcomes and reduce HIV transmission among hard-to-reach populations. In 2019 Pennsylvania had an estimated population of approximately 12.8 million, making it the fifth largest state. Currently there are an estimated 36,000 persons living with HIV/AIDS throughout the commonwealth. The Division of HIV Disease is located within the Pennsylvania Department of Health's Bureau of Communicable Diseases. The Division ensures the coordination of the Ryan White Part B Program service delivery structure throughout the commonwealth. The Part B service structure is divided into seven regional subrecipients that enter into agreements with local providers to support a full continuum of HIV care and support services in coordination with recipients of funding from other Ryan White Parts located across the Commonwealth. In fiscal year 2020 approximately $38 million was provided to Pennsylvania for PLWH. An estimated 13,200 PLWH received one or more services through the Ryan White Part B Program. In 2020 the Division was tasked with the development and implementation of a Clinical Quality Management Plan to help improve care of PLWH, and to also monitor health outcomes and client satisfaction of recipients of the Ryan White Part B Program.

Speakers*:*
- Michelle Schlegelmilch, Lean Six Sigma Yellow Belt, Clinical Quality Management Coordinator, Pennsylvania Department of Health, Division of HIV Disease
- Natasha Gorham, Executive Director, North Central District Allied Connections

3:15- 3:30 PM: Break

<p align="center">3:30 – 4:15 PM: Breakout Sessions 4</p>

Track 1: Capability
<u>Employee Development and Learning: A Case Study</u>
In any industry, a commitment to continuous learning is paramount. This presentation will present a case study of how one firm addressed this issue and implemented an internal Development and Learning program to address this. The presentation will show the path taken, from conception to implementation, and how the program has transformed the organization and employees alike. We'll focus on – 1.Planning and design of the program 2.Garnering interest and participation 3.Program measures 4.Continuous improvement The presentation will also provide a repeatable process that any organization can take and adapt to meet their own needs.
Speaker
- Amy Townson, M.A., PMP, SA, CSM, ITIL v4, Senior Manager, Momentum

Track 2: Management Systems
<u>Using Data to Inform Policy</u>
Data residing in state government systems can inform policies when organizations are empowered to link and analyze disparate data sources. This session explores examples of how to use data to inform policy decisions in State and Local Governments.
Speaker
- Chuck Grindle, Ph.D., Digital Government Executive, Amazon Web Services