Continuous Improvement Advocates

Round 11 | September – December 2022
Our Mission

CONTINUOUS IMPROVEMENT

Partnering with people, enhancing processes and empowering others to LEARN, IMPROVE, CHANGE and LEAD.
Meet the CI Team

CI Management
- Ben Thurgood

Innovation & Process Improvement
- Steve Sawada
- Matt Janzow
- Diana Surma
- Emily Becker
- Annalycia Matthews

Learning and Development
- Owen Robinson
- Indira Santiago
- Kaylee Castillo
- Emily Wood

Workforce Data & Analytics
- Tammy Liddle Lobban
- Megan Tan
- Athena Meisenheimer
- Kathy Emerson
- Nicole Ratliff
CI Advocates Program Structure

4 Workshops + Open House

Day 1
Ci Mindsets and initiate

Day 2
investigate

Day 3
improve and implement

Workshop session

Management Open House
# Round 11 Schedule

<table>
<thead>
<tr>
<th>DATE</th>
<th>TIME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/15/2022</td>
<td>8:30a – 4:30p</td>
<td>Day 1: Introduction and CI Mindsets ci4i Framework and initiate</td>
</tr>
<tr>
<td>10/6/2022</td>
<td>8:30a – 4:30p</td>
<td>Day 2: investigate</td>
</tr>
<tr>
<td>10/27/2022</td>
<td>8:30a – 4:30p</td>
<td>Day 3: improve + implement</td>
</tr>
<tr>
<td>11/17/2022</td>
<td>10:00a – 12:00p</td>
<td>Workshop Session</td>
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<tr>
<td>12/1/2022</td>
<td>10:00a – 1:00p</td>
<td>Day 4: Open House</td>
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Outside of the Classroom

In addition to classroom learning:

**Project Work**
Lead team meetings, complete project charter and practice Ci tools

**Office Hours**
Complete four office hour sessions (30 mins. each)

**Sponsor Check-ins**
Schedule time to meet with your project sponsor
Management Open House

What to expect...

**Audience**
Directors and City Manager attend however, tone is informal/roundtable conversation

**Deliverables**
Digital copies of your project charter and the tools used

**Support**
Review work samples and connect with staff during office hours or via email
Expectations

- Attend all sessions in full + present at Management Open House
- Meet with your project team and attend office hours
- Complete and upload project deliverables
Note on Icons

Look in upper right corner

- Ask Questions or Share Ideas
- Practice Your Skills
- Dive Deep to Learn More
- Review Case Study
Agenda

Day 1

- Introductions + Ice Breaker
- Widgets and Factories
- CI Mindsets
- ci4i Framework
- Break for Lunch
- initiate
- Project Charter (Overview)
- Building the Project Charter
- Homework

CONTINUOUS IMPROVEMENT
Ground Rules

- Participate
- Listen
- Ask Questions
- Acknowledge Others

CONTINUOUS IMPROVEMENT
Introductions

Share your name, department and a story about an embarrassing moment.
Bicycle Exercise

Practice solving a typical business problem.

As a team, you are assigned responsibility for the manufacturing of a Trek bicycle, the Procaliber. The product line is unprofitable and you need to help turn it around.

What would you want to know in order to increase sales and boost profits?

- 10 minutes to brainstorm in groups
- Assign 1 recorder to report out
- Use workbook to capture ideas
- Report out (4-5 minutes)
Questions to Consider

How are the issues that businesses deal with different from government?

1. Do you have similar information about processes or programs in your workgroup?
2. If so, how do you use the information to manage your processes or programs?
3. Do you use similar data to judge the effectiveness of your processes or programs?
“Government is a group of hard-working people trapped in dysfunctional systems producing invisible things for people who do not want them, on behalf of others that do, for reasons we can rarely articulate and hardly measure.”

Ken Miller
3 Myths That Keep Government from Improving

1. **We don’t make widgets**
   What we do is hard to describe, squishy, and intangible.

2. **We don’t have customers**
   We have hostages— they didn’t choose us, they don’t want to come back, and it doesn’t really matter if they are happy. Also, we have customers with competitive interests who can’t agree on what they want vs. need.

3. **We’re not here to make a profit**
   Increased revenue or time savings are not reinvested in us as employees. There is no reward for making improvements.
3 Myths That Keep Government from Improving

1. **We do make widgets**
   Our process have tangible outcomes that can be improved.

2. **We do have customers**
   Internal or external to the organization, there are direct recipients of the widgets our processes produce.

3. **We are here to make an profit impact**
   Efficient use of resources allows us to generate more and better outcomes for the community.
Quick Break
What’s A Widget?

Widgets have 4 specific characteristics.

- Widgets are things (physical or digital)
- Widgets are delivered to customers
- Widgets are known, named and specific
- Widgets can be counted
Why do Widgets Matter?

We produce widgets and deliver them directly to customers.

If we can’t identify widgets, we can’t identify the factories that need to improve.
### How to Identify Widgets and Internal Factories

**Share an example of a factory, a widget you produce and your customer.**

<table>
<thead>
<tr>
<th>Factory</th>
<th>Widget</th>
<th>Customer</th>
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<tbody>
<tr>
<td>CI Innovation Team; Ci4i Framework; CI Analysts</td>
<td>CI Advocate Training Session (PPT, Workbook)</td>
<td>CI Advocates</td>
</tr>
<tr>
<td>What resources, partners, rules, and activities are involved?</td>
<td>How Many? At what cost?</td>
<td>What do they value? Timeliness? Ease of Use?</td>
</tr>
</tbody>
</table>
Environmental Scan

STEEPLE

External
Factors of the environment

Internal
Attributes of the organization

SWOT

Helpful
To achieving the objective

Harmful
To achieving the objective

Strengths

Weaknesses

SOCIAL

TECHNOLOGICAL

ECONOMIC

ENVIRONMENTAL

POLITICAL

LEGAL

EQUITY

Curiosity

A core fundamental of Continuous Improvement is being curious.

Solving a problem is all about learning to see and dive deeper.
CI Mindsets

We’re in the middle of making it better.

Customer defines value

Slow down to go Fast

Systems, not Silos

Processes, Not People
How does the Customer define value?

- The customer must recognize the task as important.
- The task is done right the first time.
- The product or service must physically change or transform.

**8 Wastes**

<table>
<thead>
<tr>
<th>Waste</th>
<th>Example</th>
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<tbody>
<tr>
<td>Waiting</td>
<td>Sand clock (Waiting)</td>
</tr>
<tr>
<td>Motion</td>
<td>Ball with strings (Motion)</td>
</tr>
<tr>
<td>Over processing</td>
<td>Pile of unnecessary work</td>
</tr>
<tr>
<td>Inventory</td>
<td>Stack of goods</td>
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<tr>
<td>Overproduction</td>
<td>Factory (Overproduction)</td>
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<tr>
<td>Transportation</td>
<td>Lorry (Transportation)</td>
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<tr>
<td>Defects</td>
<td>Flawed product</td>
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<tr>
<td>Employee Skills (Unused)</td>
<td>Unused skill (Unused)</td>
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Customers vs. Stakeholders

Customers are a specific type of stakeholder:

Customer = Direct recipient of an output (a widget)

The customer determines whether or not a step adds value (YOU DON'T)

There can be distinct customer segments with competing interests
Customers vs. Stakeholders

Stakeholders are impacted by the outcome(s) of a widget:

The **customer** is the direct **recipient of an output (widget)**

AND

They are **impacted by the outcome(s)** produced by the output (widget)

We must also consider the interests of **stakeholders** impacted by the **outcome** of the widget (who do not receive it directly)
Customers vs. Stakeholders

Example: Permitting

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Widget</th>
<th>Customer(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who is impacted by the outcome?</td>
<td>Output of the product or service</td>
<td>Who directly receives the widget (output)?</td>
</tr>
<tr>
<td>Renters seeking multifamily housing</td>
<td>A housing permit</td>
<td>Multifamily Housing Contractor</td>
</tr>
<tr>
<td>Affordable Housing groups</td>
<td></td>
<td>Single Family Home Owner</td>
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<tr>
<td>HOAs/neighbors</td>
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</table>

CONTINUOUS IMPROVEMENT
Remember the Tortoise and the Hare?

Slow and steady wins the race!
Numbers and Symbols Exercise

You will be given 45 seconds to memorize symbols for the numbers 1 to 10.

1 | 2 | 3
---|---|---
4 | 5 | 6
7 | 8 | 9

10 - X

Write down as many as you can!
Questions to Consider

What efforts could you make to discourage silo building?

1. In your work with the city, how have you made connections and worked with other functions to overcome silo thinking?

2. How could overcoming silo thinking lead to better outcomes in your work area?

3. How might you avoid silo mentality throughout your improvement project?
Processes, not People
How can we form new habits?

Remember: people respond to the **system** they work in.

Don’t respond to problems by blaming **people**, let’s improve the **process** first.
Continuous Improvement is...

ITERATIVE, but not regressive

Time

Control

Quality Improvement
Lunch Break
Continuous Improvement

Our Framework
What is ci4i?

You may have heard about...

ci4i is a four-phase process improvement framework

initiate
investigate
improve
implement
4 Plain Language Phrases

**initiate**  
Consider the context

**investigate**  
Understand what IS

**improve**  
Explore what COULD be

**implement**  
Create what WILL be

**iterate**  
Do it all again
Ci4i Framework Tools

- **Initiate**
  - Charter
  - Project Checklist
  - Environmental Scan
  - Stakeholder Analysis

- **Investigate**
  - Baseline Metrics
  - Current State Map
  - Root Cause Analysis
  - 8 Wastes

- **Improve**
  - Brainstorm Tools
  - PICK Chart
  - Future State Map
  - Standard Operating Procedures

- **Implement**
  - 30-60-90 Day plans
  - Options Experiments
  - Mistake Proofing
  - Evaluate
initiate | investigate | improve | implement
### initiate: What is the goal?

<table>
<thead>
<tr>
<th>GOAL</th>
<th>DELIVERABLES</th>
<th>ADDITIONAL TOOLS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Define the problem</td>
<td>1. Project Charter Front</td>
<td>1. Start with Why (Golden Circle)</td>
</tr>
<tr>
<td>2. Develop the charter</td>
<td>2. Stakeholder Analysis</td>
<td>2. SMART Goals/ HARD Goals (Targeted Outcomes)</td>
</tr>
<tr>
<td>3. Get leadership support</td>
<td>3. Environmental Scan (SWOT/STEEPLE)</td>
<td></td>
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<tr>
<td>4. Establish a project team</td>
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<td></td>
</tr>
</tbody>
</table>

Workbook Page: 11
Tell us your single, salient sentence of why your project is critical.
# Project Charter Overview

## Front

<table>
<thead>
<tr>
<th>Date</th>
<th>XXXXXXXX</th>
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</thead>
</table>

### Team
- Sponsor: [Project Sponsor’s Name]
- Team Lead: [Team Lead Name]
- Improvement Team: [List names here]
- Resources: [List names here]

### Project Name of Project

### Problem Statement

- Draft a clear, concise problem statement that briefly states where and when (how long) the problem is occurring; the size or magnitude of the problem; why the problem has an impact; and who the customers are (who is impacted). A problem statement is not a question, nor is it a proposed solution, nor an unanswerable complaint. If your statement has a question mark or is written in it, you’ve got one!

### Scope

- The scope should detail the start and end of the process. It can also clarify the level of depth for the project:
  - Process Start:
  - Process End:

### Stakeholders
- Customer: [The direct recipient of the output from the process. This is the single individual/organization for whom we will design the process]
- Other Stakeholders: [List categories of stakeholders here]

### Targeted Outcomes

- [Use SMART goals where possible as targeted outcomes for the project.]
- [A few of these goals can be more qualitative/long term targets.]

### Boundaries

- [Be very selective of what you consider a boundary – question thoroughly before you agree to include one.]
- [Boundaries are completely off limits – when a project starts drifting in the direction of a boundary we must pivot in another direction.]

### Timeline

<table>
<thead>
<tr>
<th>Initiate</th>
<th>Investigate</th>
<th>Improve</th>
<th>Implement</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXXXX</td>
<td>XXXXXXXX</td>
<td>XXXXXXXX</td>
<td>XXXXXXXX</td>
</tr>
</tbody>
</table>

## Back

### What was the problem?

- [Talk about the analysis phase of the project. What did you learn about the root cause of the problem you were facing? What lessons did you identify?]
- [Use a tool whenever possible and focus on the data collected – this should drive a reiteration of your original problem statement, but rather now knowledge gained through the data versus [processes].]

### What was the impact?

- Discuss monetary, staff time, and/or resource savings. [We targeted outcomes met? Did we increase the problem-solving capacity of staff? What was the impact on the quality of services delivered and the impact on the customer (internal or external)?]

### What were the recommendations?

- [Provide information on the timeline of implementation plan.]

### What were the barriers and lessons learned?

- [Did those barriers melt away? How did you mitigate this barrier? What could be done differently next time a similar project is engaged?]

Workbook Page: 13
What Makes a Good Project?

- Process-oriented (as opposed to a whole program or strategy/policy)
- Focus on "one variation or flavor" of the process
- Limited in scope
- Within your area of expertise
Problem Statement

Craft a clear, concise statement that briefly states:

- Where and when (and how long) the problem is occurring
- The size or magnitude of the problem
- Why it’s a problem/the impact
- Who the customers are (who is impacted)
LEARN
PROBLEM
STATEMENTS IN
100 SECONDS
Practice developing a problem statement using the case study.

- Where, when, and how long?
- What is the size or magnitude of the problem?
- Why is this a problem?
- Who is/are impacted?
After Superstorm Sandy, food relief agencies in NYC could not efficiently provide meals to hungry families. An increase in donations was needed to feed as many families as possible.

- Subjective adjectives
- Predetermined solution
- Impact not clear
In October 2012, New York City was devastated by Superstorm Sandy.
Case Study: Meals Per Hour

Revised Problem Statement

After Superstorm Sandy, food relief agencies in NYC could not efficiently provide meals to hungry families. An increase in donations was needed to feed as many families as possible.

- Subjective adjectives
- Predetermined solution
- Impact not clear

In October 2012, NYC was devastated by Superstorm Sandy. Relief agencies struggled to keep up with the demand for food. Six months later, people in the Rockaways are still hungry.

- Size of problem identified
- Uses facts and data
- Impact is clear
Project Charter Front

**Project Team**

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>[The direct recipient of the output from this process. The single individual/category of individuals for whom we will design this process]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Stakeholders</td>
<td>[List categories of stakeholders here]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>XXXXXXXXX</th>
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<tbody>
<tr>
<td>Team Sponsor</td>
<td>[Project Sponsor’s Name]</td>
</tr>
<tr>
<td>Team Lead</td>
<td>[Team Lead Name]</td>
</tr>
<tr>
<td>Improvement Team</td>
<td>[List names here]</td>
</tr>
<tr>
<td>Resources</td>
<td>[List names here]</td>
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| Problem Statement | [Draft a clear, concise problem statement that briefly states where and when (now long) the problem is occurring; the size or magnitude of the problem; why it’s a problem this impact; and who the customers are (who is impacted). A problem statement is not a question, not a proposed solution, nor an un-actionable complaint, if your statement has a question mark or solution in it, you’re not done] |

| Targeted Outcomes | [Use SMART goals where possible as targeted outcomes for the project] |
| Boundaries | [Be very selective of what you consider a boundary—question thoroughly before you agree to include one. Boundaries are completely off limits when a project starts drifting in the direction of a boundary we must push in another direction.] |

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Enter a date below to reflect when you anticipate to complete each phase of your project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiate</td>
<td>XXXXXXXX</td>
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<tr>
<td>Investigate</td>
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<tr>
<td>Imrpove</td>
<td>XXXXXXXX</td>
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<tr>
<td>Implement</td>
<td>XXXXXXXX</td>
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</table>

**Workbook Page: 15**

[CONTINUOUS IMPROVEMENT]
CI Analyst (Facilitator)

**Is**

- Focused on the **process** of problem solving
- Equipped with tools for exploring tough issues
- Invested in the team’s success
- Dependent on the team for expertise and solving the problem
- Working for the whole team (not “just management”, “just customers” etc.)
- Going to ask a lot of (obvious) questions

**Is not**

- An [insert process here] expert (They don’t have “the answer”)
- Invested in a **particular** outcome
- Going to let the team fail
Who are the Project Team?

**TEAM LEAD**

- Staff support on improvement team
- Often the process lead
- Provides project management and logistical support
- Keeps team in alignment with charter goals and boundaries
- Responsible for driving implementation
Who are the Project Team?

SPONSOR

- Manager with the decision-making authority over the process being reviewed
- Provides direction on goals and boundaries via charter
- Removes barriers to implementation
- Checks in periodically throughout improvement process
Successful Sponsorship

To be a successful sponsor…

1. Understand the problem statement
2. Ensure solutions fit
3. Know what is good enough
4. Build the right team
5. Manage to results

6. Break down barriers
7. Leverage different personas
8. Make thoughtful, hard decisions
9. Ensure a strong finish
10. Pull the plug when necessary
Who are the Project Team?

**TEAM MEMBERS**
- Subject matter experts tasked with understanding the current process and designing improved process
- Core group consistently involved throughout improvement project
- Assist with implementation and follow up assignments/ process adjustments
- Generate solutions/recommendations
- May include customers

**RESOURCES**
- Subject matter experts, process co-owners and others who are “on call throughout the project but, do not participate regularly (not core team)
- May include outside vendors, internal service departments, interdepartmental management, or key customers
Quick Break
Tuckman Model

- Forming
- Storming
- Norming
- Performing
### Tuckman Model

#### Phases of Team Development

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Forming</th>
<th>Storming</th>
<th>Norming</th>
<th>Performing</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Feeling anxious and hesitant</td>
<td>• Feeling competitive and tense</td>
<td>• Beginning to work more effectively</td>
<td>• Performing at a high level</td>
<td></td>
</tr>
<tr>
<td>• Feeling out other team members</td>
<td>• Disagreeing with other team members</td>
<td>• Respecting each other's opinions and differences</td>
<td>• Making decisions and solving problems quickly</td>
<td></td>
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<tr>
<td>• Getting acquainted</td>
<td>• Struggling to establish place in group</td>
<td>• Agreeing on team rules</td>
<td>• and effectively</td>
<td></td>
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<td>• Learning roles and responsibilities</td>
<td>• Forming cliques</td>
<td>• Trusting and helping each other</td>
<td>• Working independently</td>
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<tr>
<td>• Understanding team goals</td>
<td>• Requiring team leader to facilitate discussion</td>
<td>• Not relying on team leader as much</td>
<td></td>
<td></td>
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<tr>
<td>• Looking to team leader for direction</td>
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5 Characteristics of a Great Facilitator

- Remember it's not about you
- Ask a lot of questions
- Be a brilliant listener
- Help to bring ideas together
- Be external to the process
Additional Facilitation Guidance

**Asking Questions**
- Ask open-ended questions-
- Redirect
- You don’t have to know it all!
- Let the team solve the problem

**Know the Room**
- Introverts vs Extroverts
- Watch for emotion and energy levels
- Shake up the seating chart
- Check that facility matches planned activities
Customer & Stakeholders

Customer
- The direct recipient of the output from a process or the individual(s) whom we will design the process for

Stakeholders
- Any group or individual who can affect or who is affected by the project’s outcomes
Who are the Customer and Stakeholders?

**CUSTOMER**
- Direct recipient of your product or service
- Needs to be kept in mind throughout entire process
- Know the customer segments

**STAKEHOLDERS**
- Document relevant information about individuals, groups or enterprises and about their interests and involvement in the project
- Document how each player can influence the project and how they can be impacted by the project
- Determine their levels of importance
Stakeholder Tools

### Stakeholder Analysis

<table>
<thead>
<tr>
<th>Who? (Stakeholder: Customers, Team)</th>
<th>Issues &amp; Concerns (What do they care about/role?)</th>
<th>Strategy (How can you help them?)</th>
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### Interest vs. Influence Matrix

- **Keep Satisfied**
- **Manage Closely**
- **Monitor**
- **Keep Informed**

**INFLUENCE (Power)**

**INTEREST**
George

Warehouse Manager

Metro Food Distribution
Case Study: Meals Per Hour

Practice completing a stakeholder analysis using the case study.

In small groups, identify stakeholders from the video and document their issues and concerns in Miro (or your workbook).

- Work together in Miro
- Assign 1 person to record
- 1-2 mins for each report out

<table>
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<tr>
<th>Who? (Stakeholder: Customers, Team)</th>
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# Case Study: Meals Per Hour

## Stakeholder Analysis Example

<table>
<thead>
<tr>
<th>Who?</th>
<th>Issues &amp; Concerns</th>
<th>Strategy</th>
</tr>
</thead>
</table>
| **Jamie and Lisa (CI Analysts)**  
Toyota Production System Support Center (TSSC) | Jamie and Lisa will build relationship with Metro Food Bank staff and volunteers while hosting an improvement project. Their goal is to educate the project team and provide resources needed to ensure the project is successful. | TSSC will educate food bank staff and volunteers on TPS process, aid in project documentation and lead facilitation for the duration of the project. |
| **George (Team Lead)**  
Metro Food Bank | George wants to learn how to improve the process of packing and distributing meal boxes and guide his team on the TSSC process to ensure they are included. | George will lead the project team under the guidance of TSSC. He will help direct staff and volunteers to complete all needed tasks. |
| **Volunteers (Team)**  
Rockaways Neighborhood group | Volunteers want to produce a complete meal box as quickly as possible boxes they can. They desire a system to pack boxes that is organized and does not waste food or other resources. | Volunteers will: serve on project team, assist in mapping current state and contributing new ideas for improvement. |
| **Meal Recipient (Customer)** | Meal recipients want to pick up food in a convenient location close to their home or work and do not want to wait in a long line to be served. | Meal recipients may provide feedback on their experience receiving meal boxes before and after the improvements are made to validate the proposed changes. |
Scope defines the distinct business process in which you will target your improvement efforts:

- Define the scope by identifying the start and end of the business process you are focused on
- Consider any “flavors” or variations of your business process that you may choose to include or exclude
Flavors of Scope

Same Process For All

Process: How to make ice cream

- Add milk and sugar
- Add flavoring
- Freeze

Distinct Processes

Process: Vanilla ice cream

- Add milk and sugar
- Add vanilla extract
- Freeze

Process: Chocolate or strawberry ice cream

- Add milk and sugar
- Add solids
- Freeze
Boundaries include any options or factors that limit the project team or the potential solutions produced by the project:

- Boundaries are considered completely “off limits”
- Examples of boundaries could be resource constraints, legal limitations or areas of the process that your team does not want to address
Case Study: Meals Per Hour

Practice developing a scope and boundaries using the case study.

If we were leading this project, how would we identify the scope and boundaries?

- What is the process start?
- What is the process end?
- What are possible “flavors?”
- Suggested boundaries?
# Environmental Scan

## STEEPLE

<table>
<thead>
<tr>
<th>S</th>
<th>T</th>
<th>E</th>
<th>E</th>
<th>P</th>
<th>L</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>External</strong></td>
<td><strong>Factors of the environment</strong></td>
<td><strong>SOCIAL</strong></td>
<td><strong>TECHNOLOGICAL</strong></td>
<td><strong>EQUITY</strong></td>
<td><strong>ECONOMIC</strong></td>
<td><strong>LEGAL</strong></td>
</tr>
<tr>
<td><strong>ENVIRONMENTAL</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## SWOT

<table>
<thead>
<tr>
<th>Helpful</th>
<th>Harmful</th>
</tr>
</thead>
<tbody>
<tr>
<td>To achieving the objective</td>
<td>To achieving the objective</td>
</tr>
<tr>
<td><strong>S</strong></td>
<td><strong>W</strong></td>
</tr>
<tr>
<td><strong>Strengths</strong></td>
<td><strong>Weaknesses</strong></td>
</tr>
<tr>
<td><strong>O</strong></td>
<td><strong>T</strong></td>
</tr>
<tr>
<td><strong>Opportunities</strong></td>
<td><strong>Threats</strong></td>
</tr>
</tbody>
</table>

---

Workbook Page: 19
## Outside the Factory (STEEPLE)

<table>
<thead>
<tr>
<th>SOCIAL</th>
<th>TECHNOLOGICAL</th>
<th>ECONOMIC</th>
<th>ENVIRONMENTAL</th>
<th>POLITICAL</th>
<th>LEGAL</th>
<th>EQUITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health consciousness</td>
<td>R&amp;D activity</td>
<td>Economic growth</td>
<td>Water, wind, soil</td>
<td>Tax policy</td>
<td>Legal restraints and regulations</td>
<td>Racial and Ethnic communities</td>
</tr>
<tr>
<td>Population growth rate</td>
<td>Automation</td>
<td>Interest rates</td>
<td>Food</td>
<td>Employment laws</td>
<td>Health and safety of employees</td>
<td>Historically under represented communities</td>
</tr>
<tr>
<td>Age distribution</td>
<td>Technology incentives</td>
<td>Exchange rates</td>
<td>Soil energy</td>
<td>Environmental regulations</td>
<td></td>
<td>input</td>
</tr>
<tr>
<td>Career attitudes</td>
<td>Rate of technological change</td>
<td>Inflation rates</td>
<td>Pollution</td>
<td>Trade restrictions and tariffs</td>
<td></td>
<td>The compounding impact of decisions over time</td>
</tr>
<tr>
<td>Emphasis on safety</td>
<td></td>
<td></td>
<td>Environmental regulations</td>
<td>Political stability</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Inside and Outside the Factory (SWOT)

SWOT Analysis is a technique for assessing the environment of your operations by focusing on internal and external factors:

- Strengths and Weaknesses are Internal factors
- Opportunities and Threats are external factors
Case Study: Meals Per Hour

Practice scanning the environment with a SWOT using the case study.

If we were leading this project, what factors could impact the outcome or potential improvements?

- Client demographics?
- Neighboring businesses?
- Food safety regulations?
- Work together in Miro

SWOT Analysis Miro Board

Workbook Page: 20
Targeted outcomes help us answer the question: How will we know we are successful?

- A few of the goals can be more qualitative/long term/strategic.

The project timeline should set dates to reach milestones for each phase in the ci4i framework

- You may include additional milestones as needed.
SMART Goals and HARD Goals

**Specific**: Action oriented with clear outcomes.

**Measurable**: Metrics and data based, prove success.

**Achievable**: Within scope and possible to do.

**Relevant**: Improves work/results and addresses needs.

**Timely**: State when work will be done and timeframe.

**Heartfelt**: Why is it worth it?

**Animated**: What will it look like?

**Required**: Why is it urgent?

**Difficult**: What will you become?
## Case Study: Meals Per Hour

### Targeted Outcome Examples

<table>
<thead>
<tr>
<th>Develop a survey to collect feedback from clients while they are picking up their box.</th>
<th>Reduce the client wait time during box distribution from 15 minutes to 3 minutes or less within 8 weeks.</th>
</tr>
</thead>
<tbody>
<tr>
<td>✖ A task is not a measurable goal</td>
<td>✔ Related to problem statement</td>
</tr>
<tr>
<td>✖ Unclear how it addresses needs</td>
<td>✔ Can be measured to assess result</td>
</tr>
<tr>
<td>✖ No timeline to achieve</td>
<td>✔ Timeline is clear</td>
</tr>
</tbody>
</table>
Homework

- Complete workbook exercises, work on your Project Charter
- Schedule Day 1 office hours to discuss your project with CI staff
- Review the Case Study: Boeing then and Now in your CIA WB (page 23)
- Meet with your sponsor