How three campus facilities departments are using Lean to do more with less

This is a transcription of a panel from the APPA/PCAPPA/BAYAPPA 2017 Conference in San Francisco on July 22, 2017.

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Below is the transcript from the panel "The Hidden Power of Lean: Perspectives from Three Universities" at the APPA/PCAPPA/BAYAPPA 2017 Conference in San Francisco on July 22, 2017.

PANEL

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Moderated by
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Senior Lean Practitioner, Haley & Aldrich

When did you decide to begin applying Lean in your organization?

Glenn, APL: We were getting customer complaints and tried solving the problems individually by educating our customers, but the more we tried the more frustrated they became. We did not recognize systemic issues and struggled to address the root causes. So instead of a reactive approach to solving problems, we wanted to be more proactive, and address the root cause of those problems. We were about to embark on implementing a new software program, and thought that was the right time to do something new and take a different approach to improve customer satisfaction.

By applying Lean, we were able to map the process and focus on those areas where we could make noticeable improvements.

Mike, UVA: There were too many inconsistencies in our processes; we were grossly inefficient. It translates to better service to the customer if you're able to be more efficient and more productive. We had many entrenched processes and we wanted to modernize to provide higher value to our customers. Our HR and Finance teams had already started with Lean, so our executive leadership was supportive of our Lean efforts.

Matt, UCSF: UCSF was committed to building a culture of continuous improvement. We had a lot of inconsistencies in our processes that led to inefficiencies. We wanted to look at problems and pitfalls in a systematic way.

What was the first step of your Lean journey?

Glenn, APL: We started with Value Stream Mapping by asking all involved with the process to show where they interacted in the process. We found that some steps in the process hindered progress while for other steps needed some added value. We identified 14 discrete projects and decided to test 4 of them extensively; knowing that we'd work on the other 10 later. We took on projects that were "quick wins" and offered the highest value first. This started a culture shift.

We started internally and found we couldn't do it alone and that we needed some help from someone who could understand facilities.

Mike, UVA: We recognized the need to apply Lean across the whole organization, so we decided to start with improving two areas that were very visible to our customers – fleet management and materials management. The broad impact of these efforts is intended to create more pull for improvements and spread the Lean culture.

Matt, UCSF: We looked across the board at inefficiencies. We were doing processes in different ways. Our associate director brought Lean to us because she had used it when she was in the Capital Projects department. She saw a need to systematically understand how to be strategic and decide what to work on.

What value and results have you gained or seen from implementing Lean?

Glenn, APL: Without good "before" measurements it's hard to say, but intuitively, we feel that we are doing a better job with our customers because they like what's happening in our tests. Getting customers and stakeholders in the same room together started a partnering process and now we're working more collaboratively with our customers. Having the outside perspective to spot ways to improve was also helpful.

Matt, UCSF: We now have an inclusive, collaborative process. We were able to figure out how to bring the right people together in an efficient and effective manner. For example, during the design review process we were not getting criteria and now we're getting the right people at the right time at various stages of design. The participants were excited about working together in that dynamic manner. One person will share one problem, and another person can relate. The quieter folks were able to bring more to the table through this process.

We're also getting better outcomes to meet our standards. Getting people in the same room together opened the channels of communication across silos. Our team is now seeing a culture change – they often use Lean tools in non-Lean events.

The money savings were not always apparent in the beginning. UCSF is seeing total cost of ownership going down by using Lean to standardize the design process, reduce errors, reduce emergencies, reduce reputational damage, and increase patient safety.

Mike, UVA: I agree with the collaboration piece. Now, we've gained perspectives from a cross-section of employees who we didn't previously hear from. We're breaking down silos. We're using visual management techniques and that has spread the lean culture informally.

What is working well for your team's Lean journey?

Glenn, APL: We got early buy-in from the team and interactions with customers are improving. We're seeing greater responses and positive comments from everyone. We were able to create trust and a culture shift through transparency: Practicing it, showing it, doing it.

Matt, UCSF: We've implemented PDCA (Plan Do Check Adjust) and people feel like their opinions count and their contributions add value. That sets up a cultural shift where people feel good about coming to work.

Mike, UVA: The culture of Lean is spreading. I see that every day – people are now questioning things that don't make sense to them. In the past, people would stay quiet or just do what someone told them to do. An example of this is 5S. It gives people a systematic way to organize and improve the flow of how we work in a visible way.

What isn't working well for your team's Lean journey?

Glenn, APL: We didn't account for concurrent changes. Not only were we restructuring our organization, but we also brought in new employees so we had to find the right balance between learning and doing at the same time. We needed some training and retraining as additional folks came on board.

Mike, UVA: We have three areas that are challenging: measuring success in quantifiable ways, maintaining momentum between our Lean formal sessions, and having a few folks who feel threatened by change. The challenge in knowing where to start, what our pacing should be, and maintaining momentum between gatherings.

Matt, UCSF: It's a time commitment and getting all the right people involved is always a challenge. When we first tried applying Lean, we needed to restart because we didn't have all the right people involved the first time.

What are some pitfalls that you've discovered on your Lean journey?

Glenn, APL: Instead of waiting for the changes to lead to a perfect result you've got to take small steps, keep trying, and stick with your plan. You may never get to perfect, but you may not need to get to perfect. Don't get paralyzed by the pursuit of perfection and don't wait to implement. If you can group and get most of your processes to work, then

you've made significant steps toward satisfying your customers. Also, without good baseline metrics it was hard to quantify our progress.

Matt, UCSF: It's really important to go slow in order to go fast. Like any project, the initial input and planning defines the success of the project. Everyone is so eager to get things done; it's hard to take time in the beginning to get things started in the right direction.

We had to recognize that there was going to be some "old guard" cynicism. We're facilities folks so we're reactionary and we want to fix things. We needed to change our mindset; we needed to shift to slow down and see the whole system before reacting with thoughtfulness and analysis.

Mike, UVA: We are sometimes so "in-the-weeds" that it's hard to see when "good enough is good enough." Having a Lean coach helps you see that you've done enough to make progress. It doesn't need to be perfect. It was also a challenge dealing with folks who were resisting Lean and change.

Did you experience any major surprises in your efforts?
Glenn, APL: Engaging staff and customers through the different Lean process steps really improved communications between some folks. There may have been some harbored emotions between participants, but we saw this as an opportunity to clean the slate. Participants were able to see each other's perspectives and work toward a common goal. We created better relationships with customers and workers.

Mike, UVA: An increase in engagement, trust, and excitement through transparency. A lot of us were afraid that transparency was going to turn people off, but the exact opposite happened. We are now recognizing issues together and solving them together. This helped to build trust, openness, and a collective ownership between the front-line staff and management.

Matt, UCSF: Our quieter folks came out. I saw some wonderful personalities and expertise beyond what my prejudgments were. There was much more mutual respect and admiration for what folks are doing daily and a lot of respect gained. I see it every time we do this kind of work.

If you were to begin applying Lean again, what would you do the same and what would you do differently?
Glenn, APL: It's important to have a clear vision of the process and the big picture. It was important to set the stage and build trust, reinforcing the notion that Lean was not about eliminating jobs. Because the process had many complex steps it was necessary to break it down with the goal of showing what was, what is, and why it can be better. People may want to protect their own, but you need to make it clear that process improvements provide more opportunities than consequences.

Also, training is important. It's not just for someone new to a job. When you bring new hires on board, they bring fresh perspectives. We're not hiring new people to be molded into our system, we want their new ideas too. We did some Lean training in the beginning and it felt like drinking from a firehose. That's why continuous training reinforces the message. It's also good to relate your improvement efforts to other steps within the process, and to the bigger picture.

Mike, UVA: Establish a context for Lean – that it is a philosophy and lifestyle, more than a business tool. From there, determine what to work on, by seeing and visually prioritizing your processes.

Matt, UCSF: If you're asking for participation, have people do some pre-work to learn the basics of what Lean is and what it isn't, and see how other institutions have applied Lean to help them.