The United Way of Central Ohio Community Impact group is comprised of 6 initiatives that focus on meeting needs of low income families in Central Ohio. The initiatives are run like small businesses: they do not have standardized processes for internal or external interactions. Lack of standardization created inefficiencies, poor communication, and no synchronization. We were approached to help four initiatives in three key areas: reduce variation between internal processes, create a measurement system and key performance indicators to help run the initiatives, and introduce operational analytics to help make decisions to that run the business. This design for six sigma project was completed in 5 months and decreased average time per week spent on internal processes from 8 hours to 3.5 hours, saving the department over 1000 hours per year.
Define
What's the Problem?
A nonprofit agency was experiencing inefficiencies in their internal operations, causing frustration, delays, and excess work. The initiatives department also lacked the organizational knowledge of position transfers, data analysis, or key performance indicators. Thus, there was great confusion between different departments and management.

Project Scope and First Steps
The project's scope was determined to focus on internal interactions between four initiatives and the finance, marketing, and resource development, human resources, and accountability teams within the nonprofit. To begin, detailed interviewing took place to understand internal processes and interactions. Then, detailed swim lane process maps were created to visualize the process. After input from initiative leaders, a meeting was held to determine specific project scope. Each leader explained their swim lane diagram and highlighted pain points they were facing.

These pain points resulted in the creation of an affinity diagram. The scope included pain points in the interactions between the Community Impact department with other internal teams within the organization.

Project Goals
The goals of the project were to improve and standardize internal processes between initiatives. The project will additionally establish internal and external KPIs to measure performance, and begin to incorporate operational analytics within the main problem areas.

This project will help the business by reducing waste within processes, eliminating time from extra steps and current delays. This project will also position the business with the ability to tell story to their donors incorporating data from the community.

United Way of Central Ohio is a non-profit agency that aims to reduce poverty in Central Ohio. This organization helps thousands of people every year through various programs and pathways.
Concept Design

Requirements Gathering

Detailed interviews were conducted with initiative managers and process owners from the finance, resource development, and marketing departments to understand current state process. Four main critical to quality characteristics were determined for the internal management system: provide clear standardized processes, open lines of communication, increase critical to quality characteristics, and quick and easy to use.

Future State Concept Design

The future state concept will be an interactive dashboard that displays new standardized processes. This will be used by employees at United Way to learn new processes and access documents related to critical process steps.

What is the deliverable?

The internal management system will be a dashboard showing six new standardized processes between internal departments at United Way. These outlined processes will result in standard management, saved time, and improved training.

What are the features?

This system will have interactive features, as shown above. A user can click a step of the process to access various documents, checklists, or meeting agendas that accompany a step in the process. Additionally, the system will feature responsibilities and accountabilities of different parties for each process. This will aid in training users of the system and ease the onboarding process in the future. Finally, the system will list important contacts for different processes in the system.
Detailed Design

New Process Design

Meetings were held between process owners to identify steps of processes and agree on standardization. Meetings included three departments and six processes were refined and standardized.

Building the System

The system was created in Microsoft Excel for ease of use. The system includes a homepage, overall system view, and a tab for each process with detailed steps and document links. Different links include access to calendar invites, email templates, meeting agendas, budget templates, and file folders. These items were previously scattered on different drives and are now easily available to process owners.

Implementation

The system was introduced to and approved by process owners. The use case for this system is when managers are navigating internal processes that happen only a few times per year. When completing a process, this document will be used to follow the different steps and have access to documents that are required in the process.

Next Steps

After implementation and training, bugs and other issues will be reported to the green belt candidate and improved during the Optimize Phase. There will be a three-week trial period for system use before an improvement session is held to further advance this system to meet manager needs.
Optimize System Testing

The Standard Work System was tested in many methods. First, a beta period of use was implemented for 45 days. Initiative managers used the system for their processes and were interviewed on their feedback and issues they had. Next, testing was preformed to make sure the system fit the intended use cases. Finally, issues, link errors, and bugs were fixed for system use.

Failure Mode Effect Analysis

Potential failure modes in the system were identified and assigned a risk priority number during the Detailed Design stage. In Optimize, all of these failure modes were evaluated and actions to improve were taken. There were two potential failure modes at the end of the phase that have potential for future internal projects and will be evaluated in the Verify stage of the project.

System Additions

Additions were made to the Standard Work System in this phase to increase usability and effectiveness as a future onboarding tool.

First, RACI roles were created and incorporated into the system to see who was responsible, accountable, consulted, or informed for each process. Next, organizational charts were added to the system to identify who is in each role. This is meant to help new employees become acclimated to the organization. Additionally, each manager created a Standard Knowledge Document of their position to increase the organizational knowledge of the department. Finally, training resources are available in the system for managers to quickly access trainings and resources.

Management Measurement System

A Management Measurement System was created for senior leaders to monitor initiative progress, internally and externally. This tool automatically generates charts and status indicators when data is updated, creating a dashboard of progress and allowing easy identification of initiatives that need assistance.

Next Steps

In the Verify stage, metrics will be measured to see if initiative managers were able to save time using this new system.
Optimize

Evaluation Study

After implementation of the Standard Work System, employees were surveyed on the average time spent on internal processes per week. In October 2016 – survey results indicated that the average time per week spent on internal processes was 8 hours. After another survey in February 2017, the average time per week spent on internal processes was 3.5 hours.

Impact

Between the entire department, the solution will save over 1,000 hours per year. With this extra time, employees will apply for more grants, generate new ideas, and expand current partnerships. Overall, this extra time results in helping more service recipients and a greater impact in the Central Ohio Community.

Across the department, this solution will result in an extra 1,000 hours per year for the department to focus on the following:

- More grants
- New ideas
- Help more service recipients
- Greater impact to the community
- Collaborative events
- Improved impact and results: reporting, results-based accountability

Conclusion

In August 2016, United Way of Central Ohio requested consistent process control that would produce:

- Clear, standardized processes
- Clear contacts in departments
- Improved organizational knowledge

Through the Standard Work System, these needs were resolved.

Next Steps

A control and transition plan was created and signed off by the core team. The team will now use this as guide for system updates and document ownership.

Christina Steiner is a Green Belt Candidate in her senior year studying Industrial and Systems Engineering at The Ohio State University.