



Introduction to the Lean Six Sigma Board Packet Preparation Project Staff Report

This agenda item introduces the Board packet preparation process and Lean Six Sigma concepts for process improvement.

DESCRIPTION

Development and publication of the Delta Conservancy Board meeting materials packet is a cumbersome and lengthy process that can take up to 50 days to complete. The process requires a tremendous amount of staff time and due to the length of the process, information provided early can become outdated, requiring constant editing to avoid providing inaccurate information. To address these inefficiencies, Conservancy staff are participating in CalHR's Lean Six Sigma Training Program and are using the Board preparation process as a focal project for the training course. The objective of the project is to reduce the Board meeting package preparation time from 50 days to less than three weeks.

There are currently four main steps of the Board packet preparation process: agenda, draft reports, final reports, and formatting and publishing. Staff completed a detailed process map (see Figure 9.1) and identified more than 200 steps to complete the Board packet preparation process. In the coming months, Conservancy staff will seek input and feedback from Board members and the public on the Board packet content to assess what is necessary to give the Board a sufficient level of oversight while balancing staff's time and resources. We are interested in examples of exemplary or not so exemplary packets from other organizations to help guide the process. Conservancy staff will incorporate feedback into the process and provide updates on the project at the January 2025 Board meeting.

BACKGROUND

Lean Six Sigma is the combination of two methodologies to create an integrated approach to process improvement. "Lean" was developed by Toyota Motor Corporation in the 1950s and focuses on improving efficiencies and reducing waste. "Six Sigma" was developed by Motorola, Inc. in the 1980s and focuses on improving quality and reducing defects through data analysis and metrics. There are five phases of the Lean Six Sigma process: Define, Measure, Analyze, Improve, and Control. Staff are currently in the analyze phase of the Lean Six Sigma project.

CalHR offers a series of Lean Six Sigma courses aimed to identify and implement opportunities for efficiencies in state processes. With increasingly limited budgets, state agencies are expected to do similar if not higher levels of work with less resources. Programs like Lean Six Sigma allow state agencies to evaluate existing processes, identify and eliminate waste, and provide high-quality products to customers. Lean Six Sigma concepts and training have been adopted by numerous state agencies and departments (e.g. California Department of Human Resources, California Natural Resources Agency, and California Department of Motor Vehicles) to improve processes to better meet

customer needs. Recent projects resulted in 50 percent reduction in contract processing times, 50 percent reduction in time to hire new employees, and 100 percent conversion of physical documents to electronic copies. Upon completion of the formal training, the Conservancy will apply Lean Six Sigma concepts to other processes to better meet our customer (e.g. Board members, the Delta community, grantees) needs.

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Figure 9.1. Detailed Board packet preparation process. Green denotes value-added steps, and orange shows legally required activities.

