



Update on the Lean Six Sigma Board Packet Preparation Project Staff Report

This agenda item provides an update on Lean Six Sigma Board packet preparation project.

DESCRIPTION

At the October 2024 Board meeting Conservancy staff provided an introduction to the Lean Six Sigma Board Packet Project. The objective of the project is to reduce the Board meeting package preparation time from 50 days to less than three weeks. Staff completed a detailed process map (see Figure 11.1) and identified more than 200 steps. During the last three months staff sought feedback from Board members, conducted a risk assessment, re-engineered the process, and developed implementation and control plans.

Results of the survey showed that Board members would like a similar amount of both written and oral information presented regarding action items and reductions to the Executive Officer's report and programs updates. Board members also indicated that publishing the Board packet materials online less than five days prior to the Board meeting date was reasonable.

The risk assessment results were consistent with findings from the Board member survey. The highest risks are ensuring that Board members have accurate and appropriate information to make decisions on action items – particularly with items that have legal implications.

After completing the Board member survey and risk assessment, staff re-engineered the Board Packet Process. The proposed new process consists of 36 steps that can be completed in 14 days (Figure 11.2). Process improvement tools include the creation of automated forms and emails; ad-hoc review sessions; and updates to checklists, style guides, templates, and training materials.

The annual soft savings (e.g., staff time) to the State is estimated to exceed \$25,000. Staff plan to begin implementing the revised process immediately. Staff will continue to refine the process.

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 improve and control 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 fewer 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 11.1. Detailed Board packet preparation process. Green denotes value-added steps, and orange shows legally required activities.

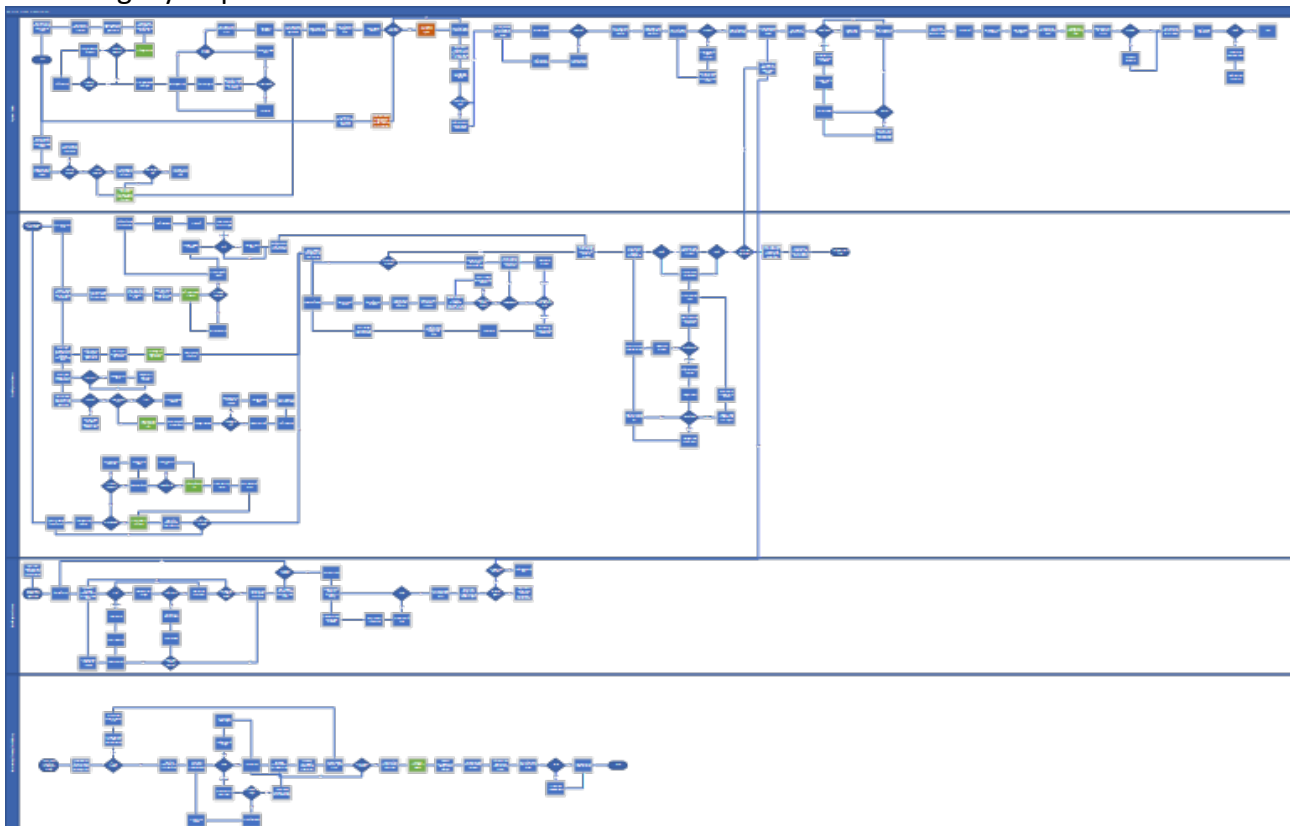


Figure 11.2. Proposed Board packet preparation process. Green denotes values-added steps and orange shows legally required activities.

