

How to Host a Day of Active Engagement & Collaboration

Our Story of Hosting a Higher Ed Lean Exchange (HELEX)

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Ruth Archer

Director Of Continuous Improvement

MICHIGAN TECHNOLOGICAL UNIVERSITY

- BS Electrical Engineering
- MBA
- PhD specialization in Organizational Psychology
- NCCI Professional Development Committee Member
- Michigan Lean Consortium Board Member
- Baldrige and Michigan Performance Excellence Examiner

Michigan Technological University

We prepare students to create the future.

Our Vision

Michigan Tech will lead as a global technological University that inspires students, advances knowledge, and innovates to create a sustainable, just, and prosperous world.

- Leading public research university, established in 1885
- Enrollment > 7,000 students
- Located in the Upper Peninsula of Michigan
- More than 120 degree programs in arts, humanities, and social sciences; business and economics; computing; engineering; forestry and environmental science; natural and physical sciences; and technology.
- Education emphasizes research, cross-disciplinary study, and team learning.



Amy Glenn

**Interim Assistant Director
Business Process Improvement Shared Service
UNIVERSITY OF ILLINOIS**

- BS, Business Administration
- Ed.M., Human Resources Education
- Certified Lean Six Sigma Black Belt



UNIVERSITY OF ILLINOIS SYSTEM

Altogether Extraordinary™

- **#14 Public University by 2017-2018 U.S. News & World Report's America's Best Colleges**
- **#52 National University by 2017-2018 U.S. News & World Report's America's Best Colleges**

- **3 University System**
- **Total Enrollment - 83,700 (2017)**
- **24,892 Full Time Employees**
- **Operating Budget - \$6.5B**
- **722,578 Living Alumni**

Krista Schulte

Lean Performance Consultant
UNIVERSITY OF MICHIGAN

- BS Industrial & Operations Engineering
- MS Engineering Management
- Six Sigma Black Belt
- NCCI Lean Community of Practice, Chair
- NCCI Conference Committee, Member
- Lean in Higher Ed, Steering Group

TOP **5**

U.S. Public
Universities
US News

19

SCHOOLS /
COLLEGES
US News



UNIVERSITY OF
MICHIGAN

263

DEGREE
PROGRAMS
US News

46

THOUSAND
STUDENTS



Introductions

... and How We Connected



Why did we want a HELEX?

Today's Objectives

- Learn what a Higher Ed Lean Exchange can offer
- Build the structure for a successful event with long-lasting impact
- Engage and collaborate with others in a simulated mini-HELEX

Here's our story, let us help create yours

Activity: Find Collaborators!



At your table, introduce yourselves and where you're from



Capture names and institutions on your HELEX template

Understanding the Intent

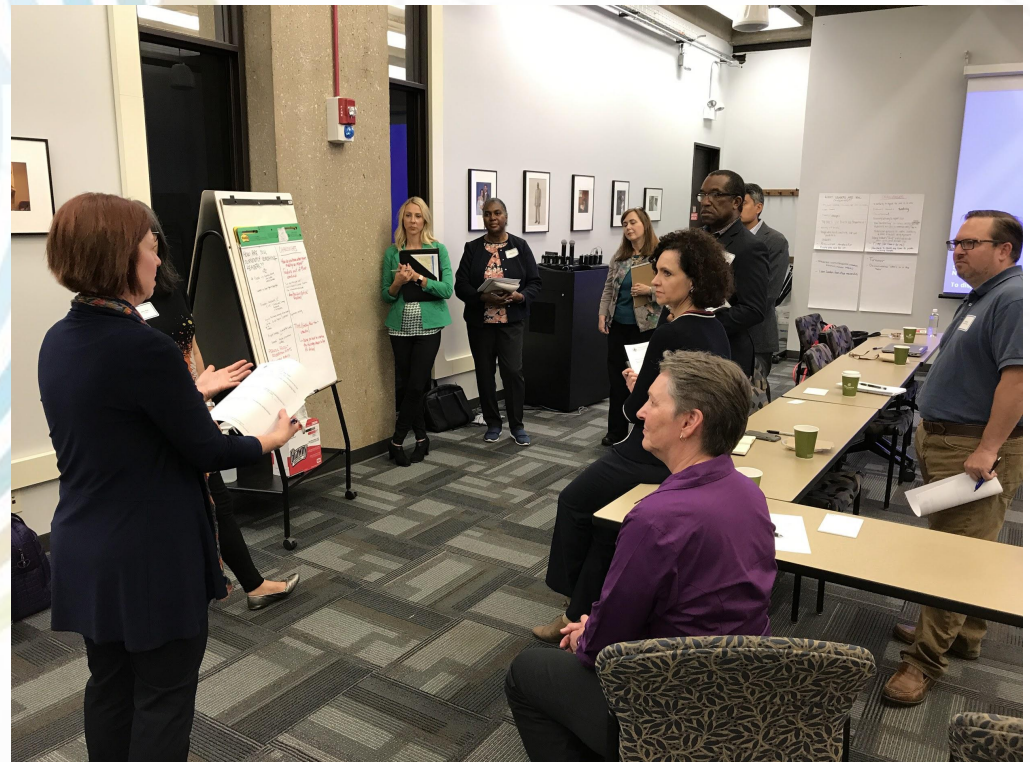
- Share problems with your peers
- Seek and deepen your understanding of issues
- Collaborate on solutions
- Use the expertise in the room to move forward

Focusing on the Problem to Solve

- Consider what problems all Lean leaders face:
 - What are you struggling with?
 - What's working well for your program?
 - What would you like help with?
 - What do you wonder about others' programs?
 - Is there someone who has had some success with a tough issue?
- Consider sending a survey to see what problems are resonating with others
- Choose 3 topics for your HELEX; who might lead each one?

A HELEX is *not* a Conference

Invite *everyone*
to share, explore,
and contribute!



Activity: Identify HELEX Topics



At your table, brainstorm potential topics: What problems would you like to discuss, give *and* get advice on?



Write the topics on your flipchart paper & capture them on your HELEX template.



Share 2 or 3 of your favorite topics with the session attendees.

Structure/Format of the Day

- Regional to keep costs low, make it accessible
- Keep it small so that everyone can participate
- Consider inviting an outside expert/facilitator for topics that everyone is struggling with
- Plan for someone to kick off each Exchange topic
- Feel free to use our agenda!

Our Exchange

- 8:30am – 9:00am Coffee and Networking
- 9:00am – 9:15am Welcome and Opening Remarks
- 9:15am – 11:15am **Exchange 1: Coaching your Leadership Team**, led by Karyn Ross, Co-Author “The Toyota Way to Service Excellence”
- 11:15am – 12:15pm Lunch
- 12:15pm – 2:00pm **Exchange 2: Measuring the Success of Your Program**
- 2:00pm – 2:15pm Break
- 2:15pm – 3:45pm **Exchange 3: Building Lean Capacity**
- 3:45am – 4:00pm Closing Remarks

Logistics

Where to have it?

Dinner the night before?

Where will guests stay?

Timing of the day?

Cost to attend?

[illegible][illegible][illegible][illegible]

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Communications



- Email invitation
- Registration
- Welcome packet
- Share afterwards

Activity: “Fast Forward”



Find a partner and take turns with this fast mini-exchange:



Share a problem you’re struggling with (1 min)



**Write down their suggestion (1 min)
Switch roles and repeat.**



Find a new partner and share again!

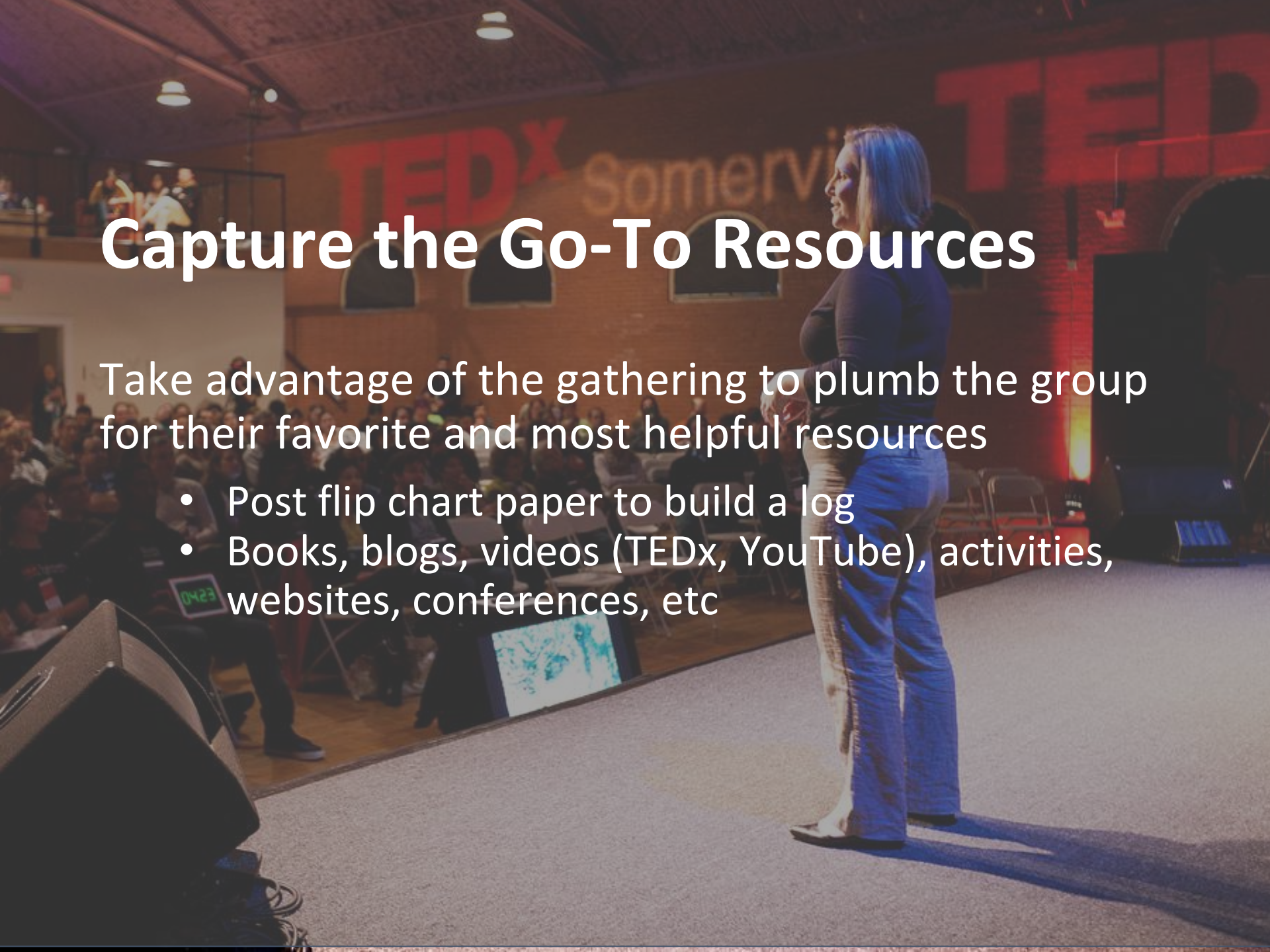
Lessons Learned

- Connecting at HELEX makes it easier to call and reconnect later
- Make the exchange as active as possible: write, draw, move, collaborate, mix groups
- Sharing ideas helps everyone's program advance!
- Remember the purpose: Use the expertise in the room to move forward

Capture the Go-To Resources

Take advantage of the gathering to plumb the group for their favorite and most helpful resources

- Post flip chart paper to build a log
- Books, blogs, videos (TEDx, YouTube), activities, websites, conferences, etc



Closing out the Event

Continue the collaboration in a shared space.

- Pictures
- Go to resources
- Content from the day
- Attendee contact information for future collaboration and networking

Hosting a Successful HELEX

- Our intent in sharing our story:
 - Define a challenge that matters.
 - Design your day to take advantage of the expertise in the room to work on shared problems.
 - Experience the feelings of active engagement and collaboration in a mini-exchange.
- Focus on the purpose:

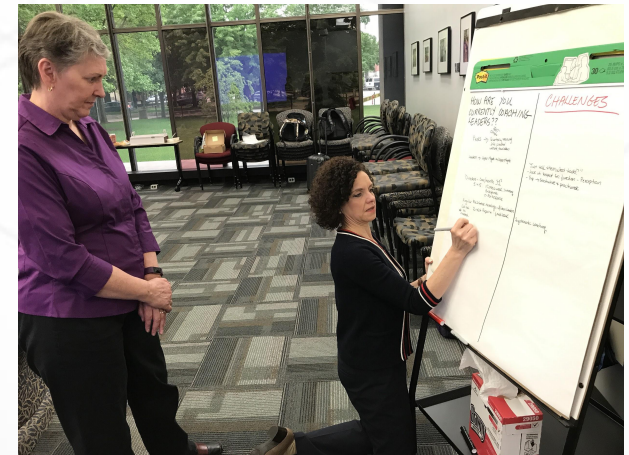
Connection. Collaboration. Results.

Check-in



Share with the group:

- What questions or concerns do you have?
- What about this will be difficult to do?
- If you create a HELEX, *what could you gain?*



Thank you!!

We welcome your feedback! Please share your thoughts in the session evaluation.