ST. PHILIP’S COLLEGE

GOOD 2 GREAT FOLLOW-UP
JUNE 15, 2011

WELCOME ATTENDEES
Agenda

- Introduction and Reflection
- Process Management Team Activity
- Team Report-outs and Process Refinement
- Lunch
- Strategic Planning and Goal Deployment Review
- Action Planning at the College Level Team Activity
- Scorecard Development
- Team Report-outs
- Action Items and Next Steps
Accomplishments

- Selected by Bill & Melinda Gates Foundation – Completion by Design as a pilot institution
- LVN Program Star Finalist
- Received “Achievement Level” Quality Texas
- PTK - 5 Star statues and listed among 100 chapters
- AT&T Donations
- Raised over $4,000 at G2G Retreat
- Conferred 972 Degrees and Certificates
Brain Power

- Customer Needs
- Barrier/Blockers
- Measurement
- Technology

KPI’s
- Trends
- Climate
- Scorecard
- Challenges
- Processes
SWOT Analysis

**STRENGTHS**
- Rich History, Diversity, HBCU & HIS Institution
- Workforce programs geared toward industry standards “military friendly”, positive internal/external reputation
- Investment in infrastructure, well equipped technology, new buildings
- Scholarship opportunities for students, strong fundraising efforts
- Strong college leadership
- Excellent customer service
- Graduate more high or at risk students

**OPPORTUNITIES**
- Expand partnership with companies to provide specific workforce training
- Build a productive & sustainable workforce, culture & organization
- Restructure applied courses to teach in content
- Include realistic & relevant advisement about work/trade requirement & limits (fuzzy conviction, drug testing)

**WEAKNESSES**
- Student Success: Progression of Developmental Education Students (testing, advising, registration)
- Lack of systematic processes:
  - quick deadlines
  - function by crisis
  - information hoarding
  - work done in silos
  - inconsistent
- People Power
- Marketing

**THREATS**
- Niche Market – market & advertising our programs
- Budget Uncertainties – funding new programs development
- Quality Standards: maintaining, raising/exceeding
- Talent & Knowledge Loss: retirement, attrition, etc.
- Exploring, Defining, Decision Making Procedure & Creative Thinking
- Morale & Opportunity to Recover: re-empower those doing the job
- Culture of Distrust
- Accountability
- Distance Education
- Non-Traditional Students
- Competition
- GED Program Delivery to students
- Unpreparedness of Students
- Internal/External Performance-sustaining employees
- Plans/Decisions based on little direction or inconsistent data
- Student Pass Rates: retention, performance, preparedness
- Accessibility-technology, students, faculty, content, etc
- Changing Processes: obsolete, inconsistent

St. Philip’s College  SWOT Analysis  May 2011
Context Map

St. Philip’s College • Context Map • May 2011

OUTSIDE TRENDS
- Lack of state funding
- Unemployment & underemployment
- Individual Responsibility & Accountability
- Cultural barrier: education needed for achievement
- Low individual expectations
- Socio-economic factors: need & fee other things
- Tax rises 4% in tuition fee for a quarter per student
- General attitudes of entitlement

POLITICAL CLIMATE
- Accountability
- Standardization
- Local Board Philosophy
- Economic Impact
- International Activities

TECHNOLOGY

ECONOMIC CLIMATE
- State Funding
- Pell Grant
- Property taxes
- Enrollment – less revenue to serve more students
- Market pressure to retool & reskill students
- Disposable income to spend on education
- Service related jobs
- Administrative level jobs
- Military bases competition, training, students etc.

CUSTOMER NEEDS
- Trained Skilled Workforce
- Technology
- Guidance
- Advising & Planning (students)
- Commitment from staff (students)
- Cross-Training (staff)
- Community-Clear communication & shared vision
- Partnerships & Involvement
- Assessing & responding to needs of the community
- Supplemental training throughout

GREAT
From Good 2

INTERNAL TRENDS
- AC Directions
- Larger avg. class size
- Campus enrollment
- Budgets decreased
- Force reductions
- Potential for reorganization

Hybrid Learning and Assess

Internal Process Improvements
- Development
- Department
- MER

Lack of employees
- Retirement
- Attrition
- No Title of Registrar
- No hard money resources

Political climate: redrawing ACCD boundaries
- Funding (internal/external)
- Elimination of low enrollment programs
- Preparedness of incoming students
- Banner
- Proposed enrollment cap
- Competition (internal/external)
- Consolidation-Scholarships, Department, Programs
Core Processes
Core Processes – TAPE

Quality Instruction
Support for Learners
Business and Industry Responsiveness
Community Engagement (Internal and External)
Institutional Operations
SPC Future

- Departmental Operation Unit Plans
- Division Strategic Action Plans
- College Strategic Action Plan
- College Scorecard
- Core Processes
Rules of Engagement

- Everyone Participate/ No One Dominate
- Build on Each Others Ideas
- Humor Helps
- Criticize Behavior /Not Person
Agenda

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Objectives:

Build skills in process management and measurement

Continue knowledge building of strategic planning deployment concepts for leadership team

Develop aligned and linked college level/organizational level action plans to objectives and goals

Draft Level 1 Scorecards
Understanding Processes

- Measuring
- Mapping
- Improving Work Processes
What Is a Process?

Process n. A series of interrelated activities which convert inputs into outputs.

- Processes consume resources and require standards for repeatable performance.
- Processes respond to control systems which direct the quality, rate and cost of performance.
What Is a Process Map?

Process Map n. A picture of a process or system sufficiently detailed to facilitate meaningful improvements.

Process Mapping: used to analyze and improve educational processes!

- A critical tool for defining performance issues, benchmarking projects and customer/stakeholder/supplier requirements.
- The flow chart breaks the process down into component parts and identifies suppliers, customers - stakeholders and time frames for each step.
- A flow chart must contain sufficient detail to show who currently does what, and at what time.
- All flow charts must first be defined as currently being performed. A most difficult task in process analysis.
Why is Process Mapping Important?

- Leads to process understanding
  -- Improvement begins with construction of “As Is” process map

- Prerequisite for process improvement
  -- ”Should Be” process maps guide improvement implementation

- First step in true benchmarking
Uses of Process Maps

- Gather data for process improvements
- Identify barriers/potential problems at interfaces
- Identify causes of bottlenecks
- Identify points to fix/develop action plans
Types of Process Maps

- Relationship Map
- Cross-Functional Process Map
- Linear Process Map (Flow Chart)
The Relationship Map

- The relationship map is used to represent processes and relationships in a general system.

- This system, for us, is the organization or a particular function of an organization.

- The relationship map does not indicate a process flow over time. It does, however, indicate the points of interface, external and internal, to an organization.
Relationship Map

Personnel (Teachers) → order → Main Office

Main Office → materials → Personnel (Teachers)

Main Office → requisition → Central Supply

Central Supply → materials → Main Office

Main Office → purchase order → Accounting

Accounting → order → Main Office

Suppliers → order → Suppliers

Suppliers → materials → Central Supply
A cross-functional map shows what the steps are and who is performing each of the steps required to produce a product or service.

The linear process is shown as moving from left to right or top to bottom, and the particular functional area involved in each step is identified. As the process moves across the page, it is connected from one step to another step by vertical and/or horizontal arrows.
The Cross–Functional Process Flow Map

**Teacher**
- Complete records
  - Enter data
    - Correct?
      - No: Make corrections
      - Yes: Enter data
- Print reports

**Main Office**
- Generate computer sheets
  - Sheets tabulated
  - Enter data
  - Print reports

**Counselor**
- Review grades
  - Correct?
    - Yes: Enter data
    - No: Notify parents to pick up report cards
  - Sign for grades
  - File Sheets

**Parent**

**Attendance Office**

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Yes
No
The Linear Process Map

...It is constructed for the purpose of showing the flow of products/services in a process or cycle over time. It shows the steps of a process.
The Linear Process Map

Begin

Distribute course descriptions

Student/guidance counselor

Teacher reviews form

Data needed?

Student registers

Correct?

Form sent

Enter data

Correct?

Final schedule
Understanding Your Process

Suppliers -> Input Requirements -> Process

Output Requirements <- Process

Customer/Stakeholders

Input Requirements

Requirements

Suppliers

Process

Customer/Stakeholders
## Process Mapping – standard symbols

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Meaning</th>
<th>Example</th>
</tr>
</thead>
</table>
| Operation: | An operation is performed whenever some change in an item occurs. The change may result from the expenditure of labor, a processing activity, or a combination of both. | • Clean a room  
• Fill out a form  
• Design a course |
| Decision Point: | A point in a process where a decision is made that leads to different processing steps. | • Is it complete?  
• Add staff or contract?  
• Is all required information included? |
| Parallelogram | Concrete output or deliverable. Also used to show inputs. | • Bill  
• Customer problems solved  
• Meal served |
| Direction of Flow: | Denotes the direction and order of process steps. | • Separate function or department |
| Connector: | Continues the flow to another line or page. | • Point process starts and/or ends. |
| Oblong: | Process begins or ends. | — |
| Queue/Wait: | To form or wait in line. | — |
Caveats

- “As Is” not “Should Be”

- Need consensus from all stakeholders (or people that touch the process)

- Don’t expect one session to be enough
Process Mapping - Steps

- List all activities (brainstorm).
- Copy activities on sticky notes.
- Arrange activities in sequential order.
- Identify decision points and alternate paths.
- Check for completeness and accuracy.
## Process Definitions

<table>
<thead>
<tr>
<th>Supplier</th>
<th>Input (be specific)</th>
<th>Process</th>
<th>Output (be specific)</th>
<th>Customer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who supplies the inputs?</td>
<td>What materials and information are required to perform the activity?</td>
<td>What are the steps of the process? (Provide a flow chart on a separate sheet)</td>
<td>What are the things and information that are the end result of the activity?</td>
<td>Who are the users of the output?</td>
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</table>
## Process Definitions

<table>
<thead>
<tr>
<th>Process Definition</th>
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<tr>
<td>Process Owner:</td>
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<tr>
<td>Supplier</td>
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Measures/Performance Indicators

- These Factors...
  - Quality – Better
  - Cost – Less expensive
  - Cycle Time – Faster

- Must link into...
  - Performance of supporting functions
  - Organizational strategy
Analysis of a Process Map

- Identify value-added activities
  -- Necessary steps (work gets done)
  -- Prevention steps (done to prevent a subsequent problem)
  -- Inspection steps (done to check a previous step)

- Identify non-value added activities

- How long does each activity take?
- Where are there current problems?
- Where are the longest delays?
Opportunities for Improvement

- Identify potential bottlenecks/barriers/breakdowns
- Cycle time analysis
- Analysis of Wait Time (Queues)
- Inspection Possibilities
Identify Potential Bottlenecks/Barriers and Breakdowns

At each process step (activity)

- What could go wrong?
- What is going wrong?
- How is it affected by previous activities?
- How does it affect subsequent activities?
Determining Improvement Opportunities

**PEOPLE**
- Don't want to use computer
- Don't understand uses
- Can't get away for training
- Full class schedule

**METHODS**
- Limited ability to practice
- Training session lasts too long
- Too much information
- Limited budget

**ENVIRONMENT**
- Training room off-campus
- Training room too small

**MATERIALS**
- Not enough equipment available
- Some computers outdated

Low turnout for computer training
Cycle Time Analysis

- Which activities take the longest time to complete?

- Why?

- Is staffing adequate?

- Is training adequate?

- Can the activity be simplified/combined with another activity/eliminated?
Analysis of Wait Time (Queues)

- Where do delays occur?

- Why?

- Is capacity sufficient for peak demand?

- Should it be? (Cost-effectiveness)

- Can you develop contingency plans/resources to satisfy peak demand?
Inspection Possibilities

- Where are problems discovered?

- Where do they actually occur?

- Would formal inspection early in the process be helpful?

- Can problems be prevented?
Develop “Should Be” Process

- Take information from analysis and develop a “Should Be” process map
- Compare process maps
- Determine measurement improvements
- Debrief Activity
Next Steps in Process Mapping

- Develop an Action Plan for process mapping
- Determine Team Members
- Request Sponsor
Lunch
Core Elements of a High Performing Organization

- Effective Leadership
- Clear Direction
- Strong Cultural Values/Beliefs
- Deployment of Goals at all Levels
- Regular Cycles of Review
- Balanced Perspectives
- Executed Results
Scorecard and Action Planning Process

Objectives, Goals, Strategies

College Level

Balanced Scorecard

Measures / Goals
Plus Agreed Other Key Org.
Level Measures / Goals

12-24 Max.

Unit Level

Balanced Scorecard

Deployed Unit Level Measures / Goals
Plus Agreed Other Key Process
Measures / Goals

12-24 Max.

Department Level

Balanced Scorecard

Deployed Dept. / Process
Measures / Goals
Plus Agreed Other Key Team
or Process Specific Measures

12-24 Max.

Individual and Student Level

Balanced Scorecard

(Goal Deployment)

(Goal Deployment)

(Goal Deployment)
Step By Step Goal Deployment

- Strategic Objectives and Goals are Non-negotiable
- Action Plans can be Adopted, Adapted or Negotiated
- Measures of Success Align to Goals and Actions
- Targets are set Based on College Level Targets, External Benchmarking, and Current Trends
Workshop Actions

- Break Into Focus Area Teams, Assign roles
- Assign a Champion for Goals
- Distribute Team Worksheets, Action Plan Templates
- Develop Action Plans for Each Goal
- Develop 1-4 strategies per goal

- Develop Action Plan for each strategy
- Create 4-12 Action Steps for each strategy
- Request Help from Facilitator
- Check for linkage to SWOC
- Complete Drafts and Present to Leadership Team
Break
Team Report – Outs
A History of Keeping Score

- Kaplan and Norton research high performing organizations (KPMG and Harvard study 1990)
- Scorecards provide the linkage between vision and strategies
- Measures indicate the success of the strategies and actions
- Balance of indicators guide and manage the organization’s journey
- Targets set the future direction
Why Keep Score:

- Need for a comprehensive set of measures to determine success
- Balance of “leading and lagging” measures
- Provide knowledge of relationships of systems and focus areas
- Communicate progress or need to improve/rework
- “Inspect” your expectations!
- Align all performance tools to objectives and goals
### Universal Indicators of a Balanced Scorecard

#### Financial Perspective

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#### Stakeholder Perspective

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#### Employee Perspective

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#### Process Mgt. Perspective

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Goal Deployment

Scorecard and Action Planning Process

**Senior Leaders**
- Objectives, Goals, Strategies
- Balanced Scorecard
  - Measures / Goals
  - Plus Agreed Other Key Org. Level Measures / Goals
  - 12-24 Max.

**Unit or Department**
- (Goal Deployment)
- Balanced Scorecard
  - Deployed Unit Level Measures / Goals
  - Plus Agreed Other Key Process Measures / Goals
  - 12-24 Max.

**Function or Process**
- (Goal Deployment)
- Balanced Scorecard
  - Deployed Dept. / Process Measures / Goals
  - Plus Agreed Other Key Team or Process Specific Measures
  - 12-24 Max.

**Team or Individual**
- (Goal Deployment)
- Balanced Scorecard
Indicators of Measurement Success

- Few and Focused
- Measure what is important to the customer
- Measures have to be actionable
- Measures developed from “catch-ball” concept
Develop an Organizational Scorecard

- Teams use drafted action plans for “focus area”
- Assign roles and responsibilities
- Use focus area scorecard template and determine “key” performance indicators
- Identify “targets” for each indicator (historical, benchmarking, and continuous improvement)
- Identify any potential barriers to scorecard development and reporting
- Report-out selected measures and targets for success
Team Report – Outs
Edit and Refine Action Plans

- Teams return to break-out assignments
- Edit and refine action plans based on input from senior leadership
- Review and refine key measures if needed
- Identify barriers/blockers for action planning and goal deployment
- Return to large group and team spokesperson will present revisions and barriers/blockers
- Request help from facilitator
Next Steps and Action Items Review
Additional Resources

- The Process Management Memory Jogger
- Kaplan and Norton’s *Balanced Scorecard*
- Mark Graham Brown’s *Keeping Score*
- Chang and Morgan’s *Performance Scorecards*
- Tenner and DeToro’s *Total Quality Management*
- *The Team Handbook*, the Joiner Methodologies Group