THE UNIVERSITY OF ALABAMA®
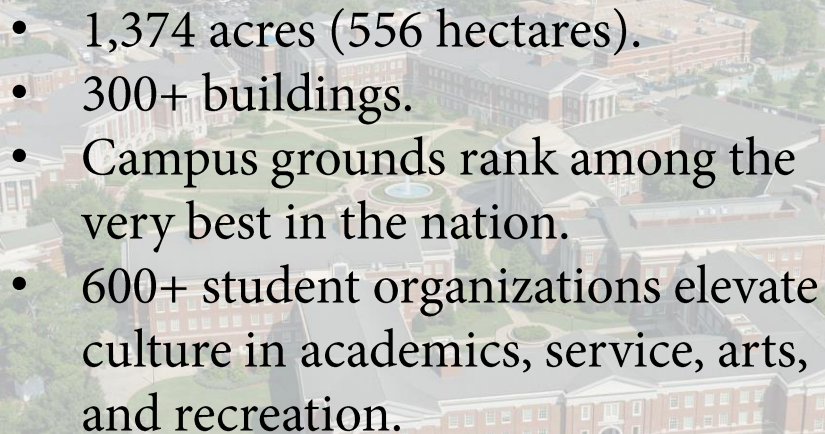
WHERE LEGENDS ARE MADE®
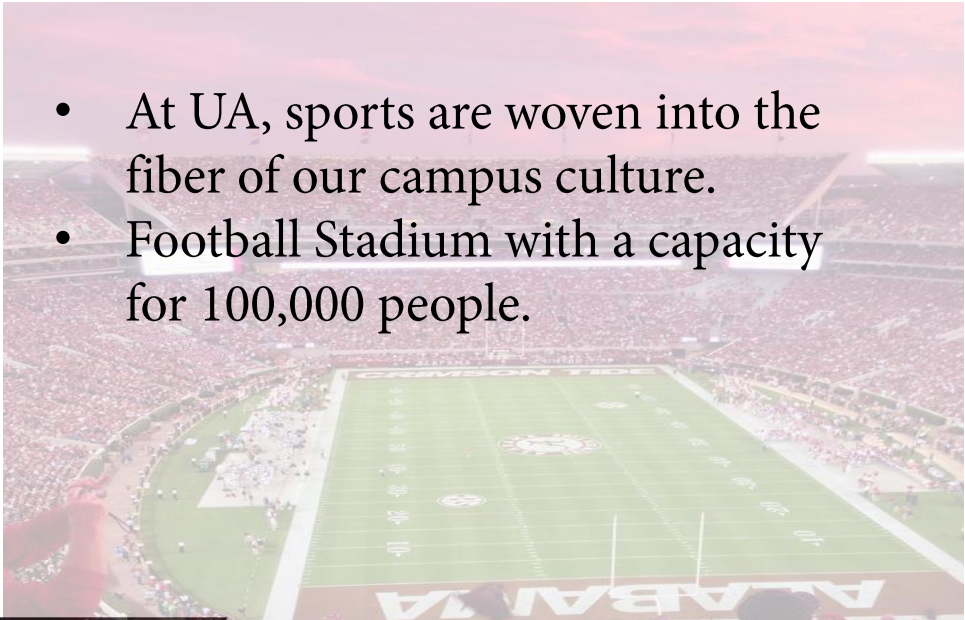
Agility: The University of Alabama
Continuous Improvement Program
July 2023

The University of Alabama

- 12 colleges and schools.
- Nearly 200 programs (bachelor's, master's, and doctoral degrees)
- Doctoral University - Very High Research Activity Classification.
- Continuous Improvement is linked to the UA Strategic Plan.

- Founded in 1831.
- Located in Tuscaloosa, Alabama – a vibrant, multicultural community of 110,000 people.
- 38,000+ students.

- 1,374 acres (556 hectares).
- 300+ buildings.
- Campus grounds rank among the very best in the nation.
- 600+ student organizations elevate culture in academics, service, arts, and recreation.

- At UA, sports are woven into the fiber of our campus culture.
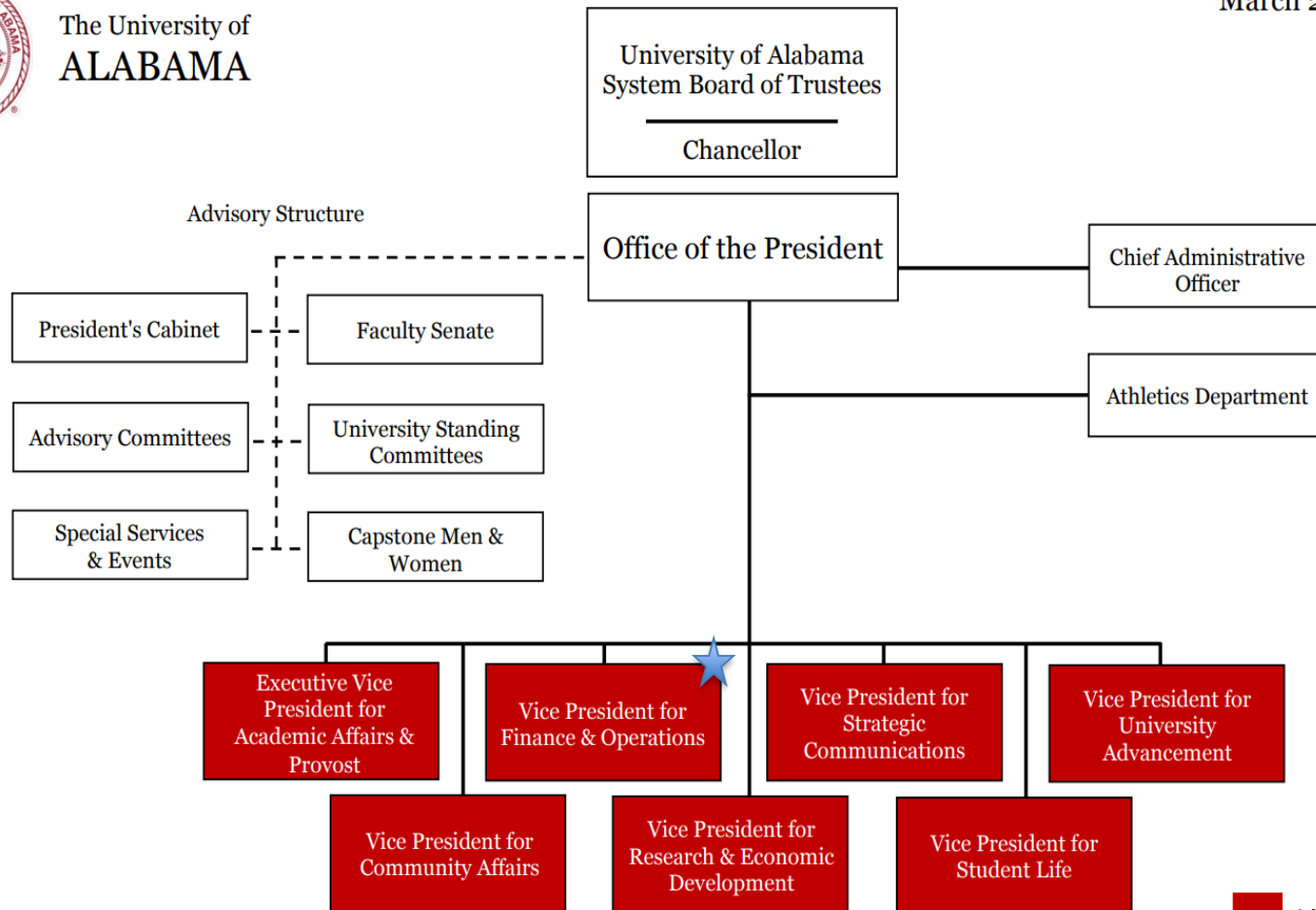- Football Stadium with a capacity for 100,000 people.

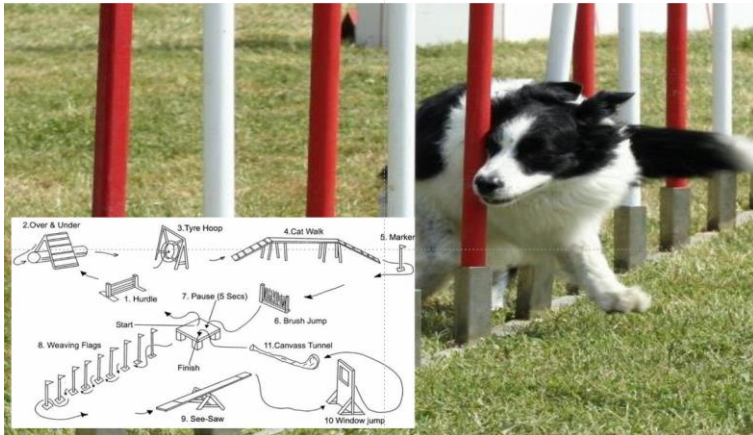WHERE LEGENDS ARE MADE®

The University of Alabama – Organizational Chart
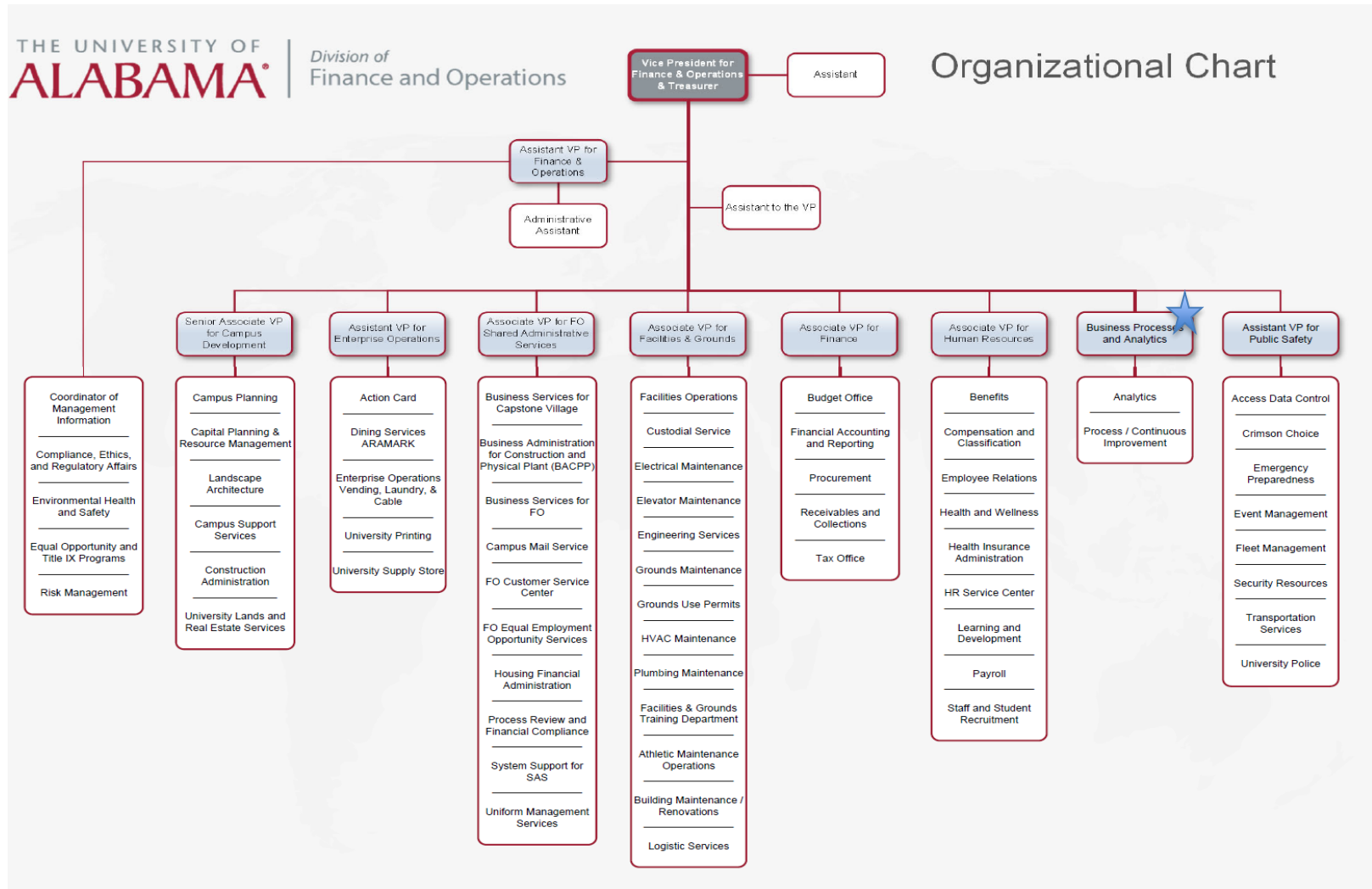
The Beginning…

NCCI Annual Conference

Google Search on Agility presented this:

Organizational Agility: A Strategic Imperative

	Macro Mission:	Demands agility
	Institutional Capability:	"We" define agility and attributes
	Individual Catalyst:	"I" seek out ops to build agility

Agility Timeline

Origin

2019

The NCCI Conference spurred ideas about how to incorporate continous Improvement into UA.

Training/projects

2019

Who's ready for change? UAPD, HR, Construction Admin

VP Project List

2020

Let's start with a list of University-wide projects...

2019

2020

Agility Rollout to VPs

2021

Let's start with cultural changes!

Agility Teams

2021

Building Agility teams within colleges and divisions

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Agility

7
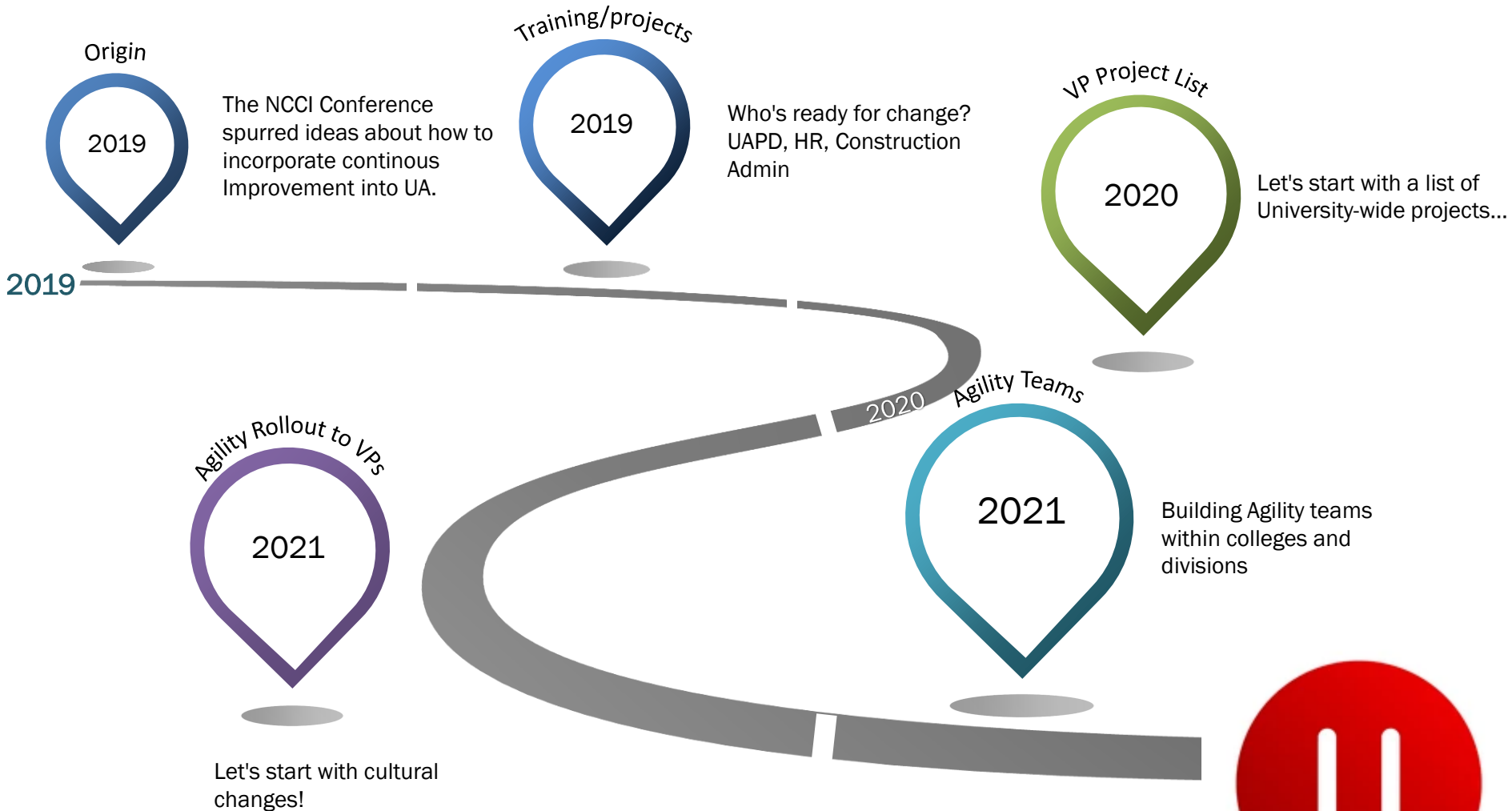
What is Agility?

It is The University of Alabama's Continuous Improvement program using Lean Higher Education (LHE) change methodology. It supports **respect for people** and **continuous improvement**.

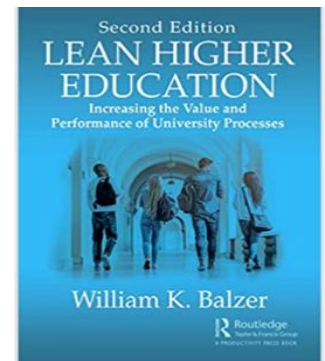- <u>Way of Behaving</u>: Engaging employees and departments by respecting each other, having a willingness and ability to collaborate to solve problems, actively soliciting ideas for improvement, encouraging teamwork and helping each other be their best.

- <u>Way of Thinking</u>: Train employees to make better decisions, be more productive, continually identify non-value-added activities or inefficiencies, and use problem-solving tools to remove inefficiencies from their processes.

- <u>Set of Tools</u>: Provide the support structure and methods by which process improvement can happen. Used correctly the tools help identify underlying problems and their causes which can then be addressed vs. guessing at solutions in the absence of Lean Higher Education.

Second Edition
LEAN HIGHER EDUCATION
Increasing the Value and Performance of University Processes

William K. Balzer

Leadership Support for Agility

THE UNIVERSITY OF ALABAMA®
Message from the President

Dear Students, Faculty and Staff,

Faculty and staff, in the spirit of striving for excellence and innovation, I encourage you to learn more about Agility, UA's branded program to foster collaboration, cross-team communication, employee engagement, continuous improvement and problem-solving. Let's continue to find ways to serve our students and deliver innovation in all aspects of University processes, services and offerings.

Dr. Stuart Bell – UA President

"Continuous improvement is a vital aspect of any successful organization. The University must strive to evolve, both organizationally and operationally, to remain on the cutting edge of success in higher education."

Bob Pierce – Advancement

"What are the processes that you dread? Your agility team needs to hear about them so we can discover methods to improve them."

Matt Fajack – Finance and Operations

"We want to encourage our staff to branch out of their silos, collaborate across the division and think broader about our stakeholders. Who is impacted by or benefits from changes made? Include them in our discussions and empower them to make recommendations and decisions."

Ryan Bradley – Strategic Communications

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Agility Teams

In 2021**, 18 Agility Teams** were created across the different Divisions and Colleges. The Agility Teams are the champions of Agility and its respect for people and CI tenets.

Roles:
- Disseminate Agility awareness information to leadership teams and the organization.
- Be role models for an engaging, collaborative culture.
- Solicit problems to solve/processes to improve.
- Document process improvement / continuous improvement efforts so the college/division gets credit for the work being accomplished.
- Celebrate the organization's successes!

Our department provides content, guidance, training, and tools.

We organize meetings and exchange communications with the Agility Teams <u>throughout the year</u> to find out their improvement efforts and benefits, present Agility concepts and support them.

Agility

Agility – First Steps – Pros/Lessons Learned

Pros:
- Demonstrated culture's importance vs. handling projects the same way
- Planted seeds of continuous improvement
- Started the conversation
- Secured executive leadership support
- Be persistent!

Lessons Learned:
- Have more of a goal in mind, especially for academic side
- "Voluntold" vs. ready to change Agility team members
- Have more tangible to-dos for the Agility teams and recognize it's hard to take the first step
- Don't use the term, "customer!"

Agility Timeline (part 2)

Consulting
2021

Retreats, All-hands, Team meetings
Continuous Improvement projects (leading and facilitating)

Community of Practice
2021

Instigated The Tide is Changing Community of Practice organization

Book Club
2022

Continuous improvement book club

Agility Training/Website
2022

Created Agility Training Series curriculum
Launched department and Agility websites

Agility Live!
2023

First annual event to celebrate departments' continuous improvement work

2021

2022

2023
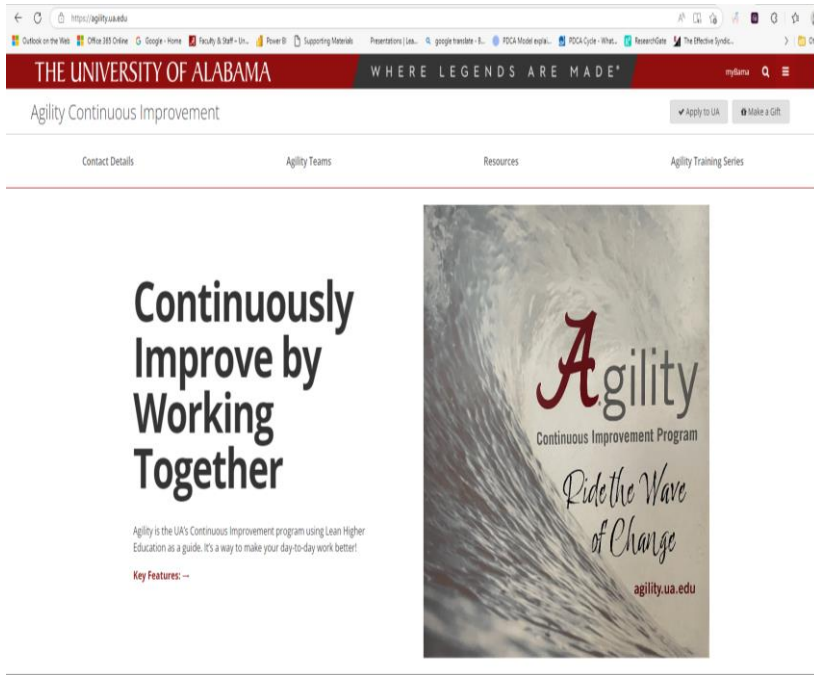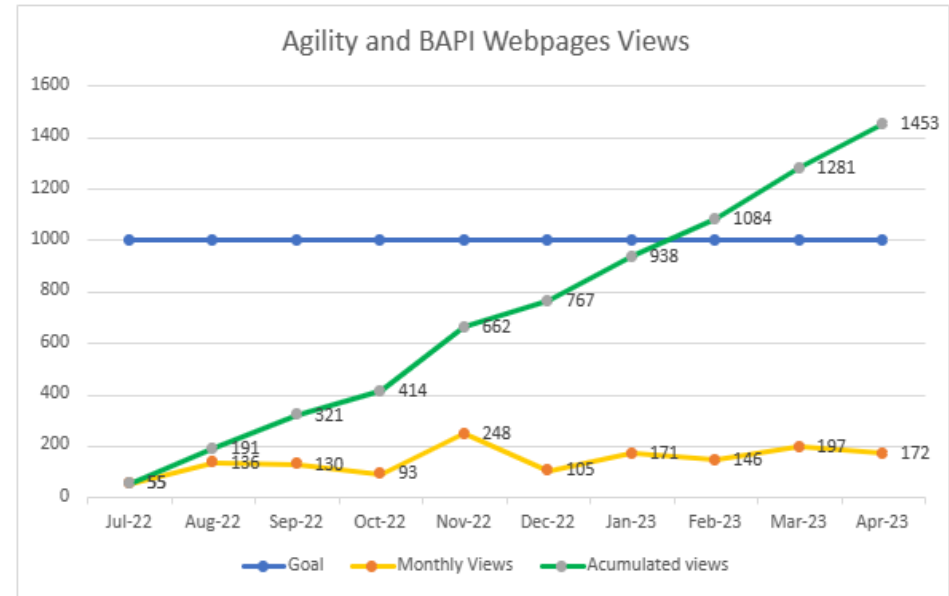
Agility

Agility Webpage

The Agility webpage was launched in July 2022. We promote accessing it for useful content and resources for employees' and Agility Teams' use - It includes success stories and spotlights, Agility Teams information, Agility resources, and Agility training info.

Agility Webpage:
https://agility.ua.edu

Agility Training

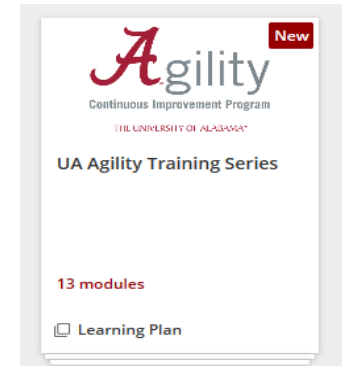
- Developed CI training specifically for UA.
- **Launched Agility Series Training** during the summer of 2022 as a pilot. Then, the **8 courses** were organized as a **Learning Plan**.
- **New and improved courses** for the 2023 Series (**13 courses**)

Learning Plan:

Cultural Topics	Methodology Topics
Psychological Safety	Lean in Higher Education – LHE Part I
Change Management	LHE - Part II / Non-value-added activities
Problem-Solving	Root Cause Analysis
Liberating Structures	Process Improvement Overview
	Brainstorming
	Data Analysis and Metrics
	Process Automation
	Collaboration Tool – Miro
	PDCA (Plan-Do-Check-Act)

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Agility Training (page 2)

- **37 Agility series sessions** conducted via LMS professional development (**Jun/22 - May/23**)

- **414 participants** in the **37 Agility sessions. 118** of them were **new participants.**

- **84 - other Learning sessions and workshops** – independent of LMS. (Since the end of 2021).

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Agility

Agility Live! Event

In March 2023, we held the first Agility event at the University: Agility Live!
We brought together a diverse group of UA Faculty and Staff members, united by their ideal of continuously improving.

Keynote Speaker was Coach Nick Saban. The Program included presentations from five Agility Teams, Myths about Agility, and Tips to Increase Psychological Safety and Encourage Agility.

In the end, we invited participants to reflect on what they would commit to including in their day-to-day actions as a leader or part of a team.

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Agility – Further Steps – Pros/Lessons Learned

Pros:
- Agility Series classes and departmental meetings
- Multi-faceted approach
- Increased morale
- Added Continuous Improvement to the Performance Review document
- Be cheerful, encouraging, nagging/relentless, plant "you can do it" thoughts

Lessons Learned:
- Some Agility teams still struggle with their authority
- Initial meetings with divisions and colleges should be by Carolina and me
- Misconceptions about Agility should be addressed
- Tips and other ideas should be sent to a wider audience
- It is okay to restaff Agility teams
- Agility teams need hand holding
- More specific activities for Agility teams
- Need a way to track each Agility team, training, CoP, and Book Club (Miro)
- More focus on middle manager level
- Agility teams not sending information out to their organizations

Agility Pain Points and Misconceptions and How to Change Them
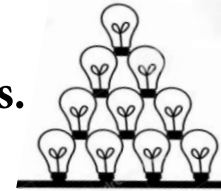
- **Agility is seen as a project.**

- **Continuous Improvement is seen as separate work or extra work.**
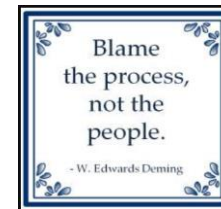
- **Teams think that Agility is looking for big improvement projects.**

- **Agility is thought of as a way to reduce Staff. Agility is seen only as cost savings.**

- **Employees are afraid of the consequences of making errors – hide mistakes.**
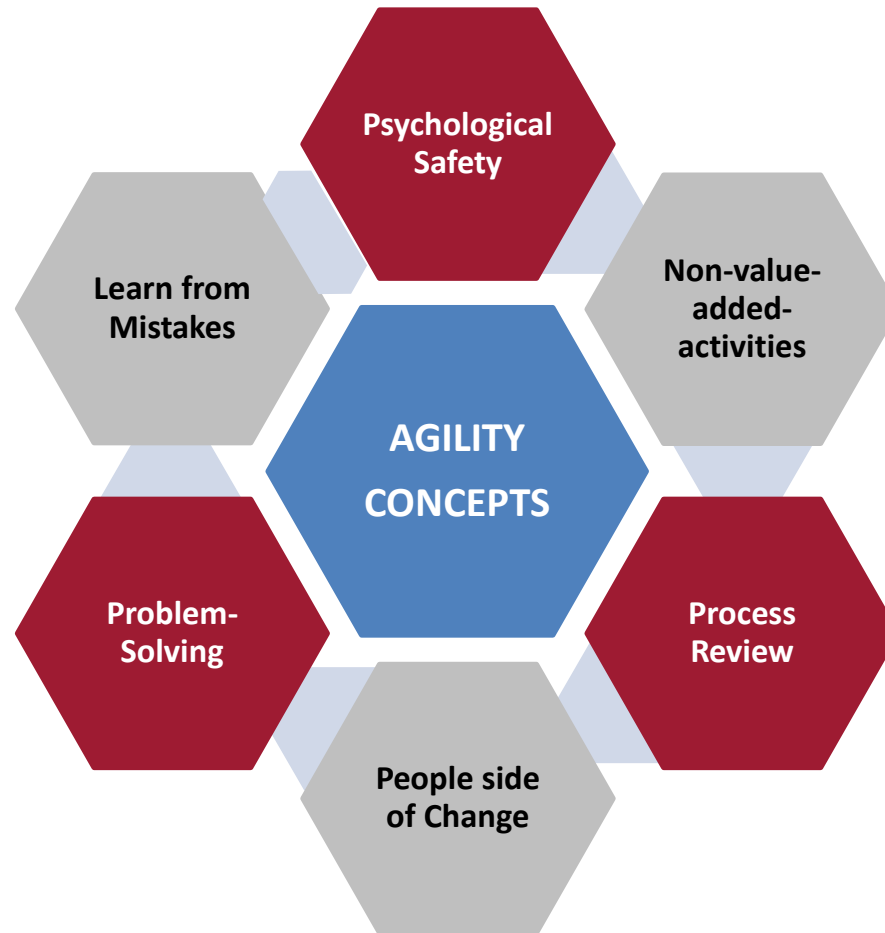
- **Teams think that the results of Agility will happen overnight.**

Some Agility Concepts

We support continuous improvement projects while supporting the culture side of Agility.

Psychological Safety

Learn from Mistakes

Non-value-added-activities

AGILITY CONCEPTS
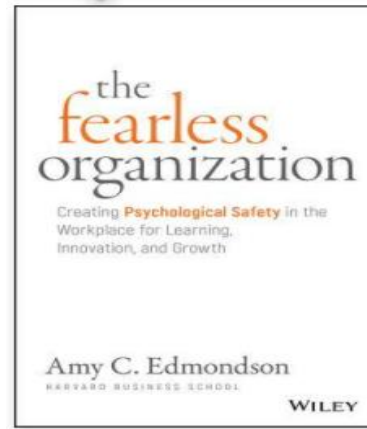
Problem-Solving

People side of Change

Process Review

Psychological Safety

We present Psychological Safety as the basis for Agility and their respect for people at the UA. We help to create and foster psychological safety.

> *"Psychological Safety is a shared belief held by members of a team that the team is safe for interpersonal risk-taking"*
> **Amy Edmondson**

the **fearless** organization

Creating **Psychological Safety** in the Workplace for Learning, Innovation, and Growth

Amy C. Edmondson
HARVARD BUSINESS SCHOOL

WILEY

[Building a psychologically safe workplace TEDx talk](#)

Learner Safety
Challenger Safety
Collaborator Safety
Inclusion Safety

Blue EQ

Stage 4: Challenger Safety

Stage 3: Contributor Safety

Stage 2: Learner Safety

Stage 1: Inclusion Safety

The Ladder of Vulnerability™

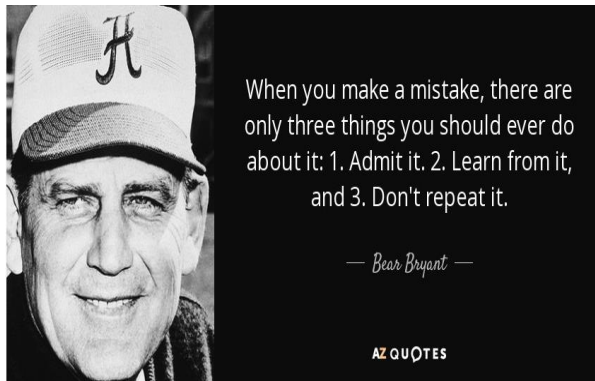www.leaderfactor.com

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Learn from Mistakes

We reinforce sharing mistakes and failures rather than discourage risk-taking and discussing mistakes.

- Understand that errors are not always associated with poor performance (poor processes) and that not all failure is negative.

- Intelligent failures, in fact, bring valuable discoveries and learning opportunities to teams.
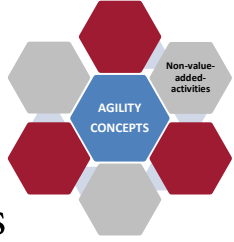
- Make errors visible.

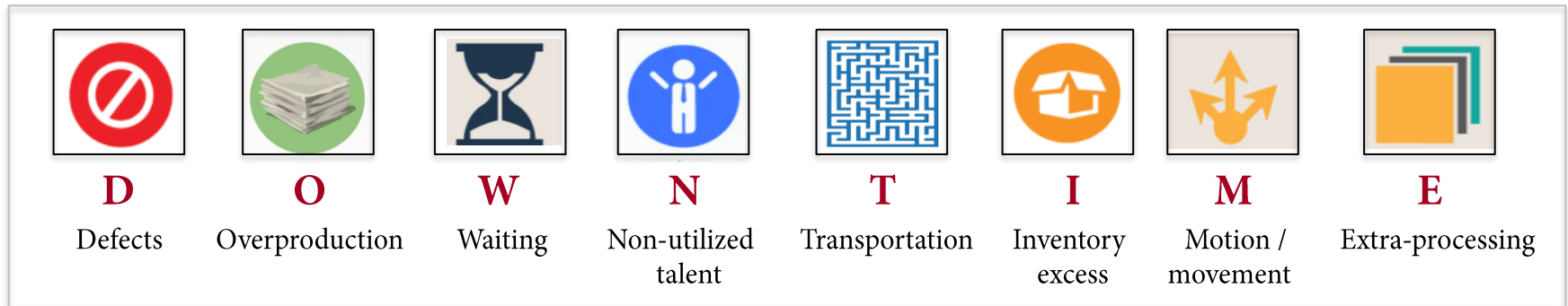**Think about your own favorite mistake**

FAIL

FIRST ATTEMPT IN LEARNING

When you make a mistake, there are only three things you should ever do about it: 1. Admit it. 2. Learn from it, and 3. Don't repeat it.

— Bear Bryant —

AZ QUOTES

"Don't waste a failure"
- Nick Saban

MY FAVORITE MISTAKE

HOSTED BY MARK GRABAN

Be kind to yourself

Nobody is perfect

We all make mistakes

Let's learn from our mistakes and help others do the same

#MyFavoriteMistake

My Favorite Mistake Podcast – Mark Graban

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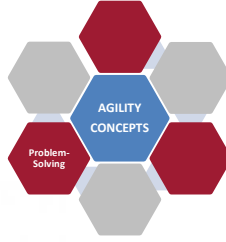Agility

Non-Value-Added-Activities

We encourage and help employees at the UA to identify non-value-added activities in their processes.

Like many organizations, we use the acronym **DOWNTIME** to help recognize non-value-added activities that may be present in the processes.
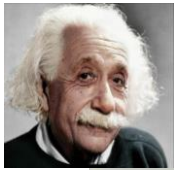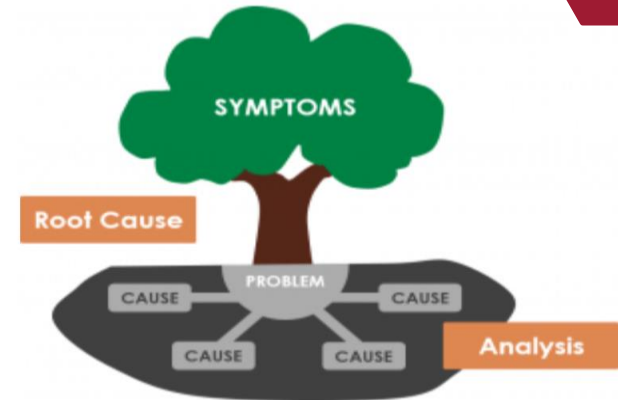
D	**O**	**W**	**N**	**T**	**I**	**M**	**E**
Defects	Overproduction	Waiting	Non-utilized talent	Transportation	Inventory excess	Motion / movement	Extra-processing

- Value-adding work
- Non-value-adding work
- Value-enabling work

Problem-Solving

We encourage to:
- Seek the root cause –> Do not **address symptoms**
- Transfer complaints into a problem to solve

"If I had one hour to save the world, I would spend fifty-five minutes defining the problem and only five minutes finding the solution."-Albert Einstein

Focus on properly formulating the problem statement before an improvement effort starts.

- Provide **enough information** to understand the **issue** and the **need** for an **improvement**.

- Clear to be understood by persons not closely related to the process.

Processes Review

We have led and facilitated improvement projects with different divisions, and we conduct process improvement education to support Continuous Improvement/Agility.
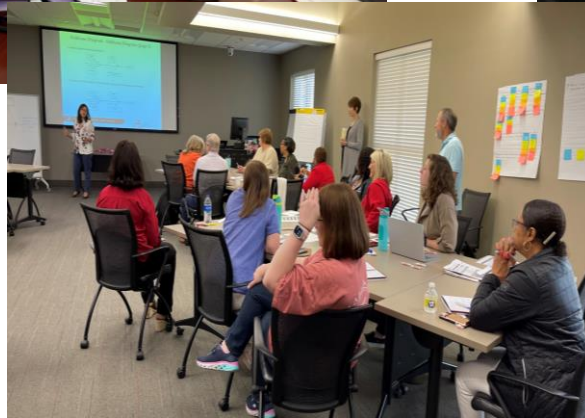
Processes Review - Benefit Quotes-ish

Benefits of Process Review/Mapping mentioned:

- Creating the current process flow is like therapy.

- I thought I knew what was wrong, but it is very cathartic to
  say it out loud. [when mapping out each step and talking about the pain points]

- Even if we can't implement the future state, it is so helpful to have the current process
  documented, not just the process that is outlined in training or the manual.

- It's been great to have all the stakeholders together to map the process. I didn't know I
  could or should include others.

- It's valuable to have an interested third party facilitate the discussion about the current
  and future processes.

Agility

People Side of Change

We foster and support change management to lead and implement changes more smoothly and to have changes better accepted.

Effective change management requires an **understanding** and appreciation of **how one person makes a change successfully**.
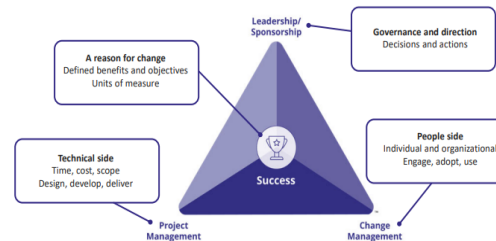
Managing Transitions
— William Bridges

STAGE	TASKS	EMOTIONS & OUTCOMES
ENDINGS	Dealing with loss—grieve; Accept what is.	Anger, blame, fear, shock, denial, self-deception
MIDDLES	Transitional period— looking back and ahead.	Anxiety, confusion, uncertainty, apathy, immobility
BEGINNINGS	Setting new goals— building hope and proceeding with care	Integration, reinventing yourself, new meaning, success, satisfaction, elation

An organizational move to a future state

Current → Transition → Future

Ultimately requires individuals to move from their own current to their own future

Ending what currently is | Middles – Transitional period | The new beginning

Change management is an enabling framework for managing the people side of change.
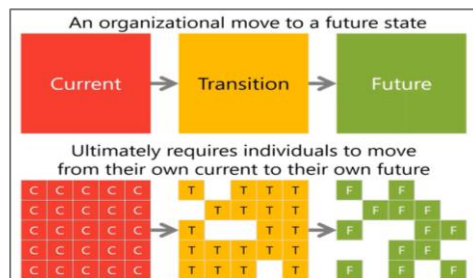
What is Change Management | Prosci

PCT Model: Critical Aspects for Success

Leadership/ Sponsorship

Governance and direction
Decisions and actions

A reason for change
Defined benefits and objectives
Units of measure

Technical side
Time, cost, scope
Design, develop, deliver

People side
Individual and organizational
Engage, adopt, use

Success

Project Management

Change Management

Prosci®
PEOPLE. CHANGE. RESULTS.™

Model of Individual Change

A Awareness – Of the need for change

D Desire – To participate and support the change

K Knowledge – On how to change

A Ability – To implement desired skills & behaviors

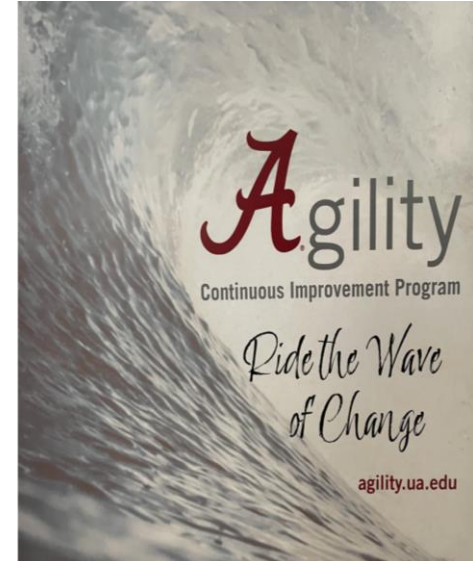**R** Reinforcement – To sustain the change

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How We Encourage Agility

- **Agility Series Training**

- **Agility Agenda Item**

- **Reinforce including stakeholders and beneficiaries**

- **Empower people to constantly contribute with ideas**

- **Encourage leaders to practice and promote continuous improvement themselves.**

Future Priorities

- Continuous Improvement Software: Pilot at Finance and Operations Division.
- Increase the penetration of Agility and Continuous Improvement on the academic side.
- Offer Micro-credentials.
- Create an Agility awareness video.
- More campus-wide awareness - Agility tips.
- Agility Live! 2

Self-Reflection / Exercise

1. Reflect on:
   - **What?** What are your main takeaways?
   - **So What**? Why are they important? What patterns or conclusions are emerging?
   - **Now What**? What actions you can start including in your day-to-day work or in your improvement plans?

   Write down your thoughts.

2. Discuss in your table group.
   Designate a person to present the main ideas to the larger group.

3. Share one main idea with the whole group.

Self-Reflection - Think about your Own Favorite Mistake

If you want to share your own favorite mistake with the group, include it on the following idea board during the rest of the NCCI Annual conference or later:

IdeaBoardz - My Own Favorite Mistake - NCCI Conference

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Questions?

Thank you

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