



2023 LEAN SYSTEMS SUMMIT

*Where
Government,
Services, and
Manufacturing
Meet*

*Exploring
the
Future
Together*



**AUGUST 10-11
2023**

**Holiday Inn by the Bay
Portland, Maine**

2023 LEAN SYSTEMS SUMMIT

PRE-SUMMIT WORKSHOPS

THURSDAY, AUGUST 10, 2023

7:00am - 8:00am	Registration & Continental Breakfast. (There will also be a mid-morning break with refreshed drinks and a mid-afternoon break with drinks and "nibbles" to boost your energy!)				
Room					
8:00 - 10:00	WS-1 Strategic Mastery: Leveraging Influence & Leadership Skills for Lean Problem Solving with a Customized Action Plan Elisabeth Swan, Swan Consulting Associates, Inc.	WS-2a WS-2b Applying Lean Thinking to Facilities & Maintenance John ,Perrotti, Fuss & O'Neill Manufacturing Solutions, LLC	WS-3 A Holistic Approach to Your Lean Transformation Nancy DeSisto, CI Collaborative & Walter Lowell, Lean Capitol, LLC	WS-4a WS-4b LEAN Into Wellness Stefan Martiyan, US EPA, Office of Continuous Improvement	WS-5 Shingo Model Overview Bob Elliott, Greater Boston Manufacturing Partnership (GBMP)
10:00 - Noon					
Noon - 1:00	LUNCH (Is provided and includes choices of sandwiches, salad, chicken. dessert, etc.)				
1:00 - 3:00	WS-6a Inclusive Leadership Behaviors: Driving Growth in Today's Business Environment Leili McKinley, Identitytype Group, LLC,	WS-7 Learning Lean from a Bunch of Nerfballs Fred Shamburg, Leanovations, LLC	WS-8 Learn to See and Deepen Your Understanding Anne Frewin, ADM	WS-9a RESERVED	WS-10 Thinking Beyond Technology with Less Software and Delighting Customers Ken Eakin & Craig Szelestowski, Lean Agility, Inc.
3:00 - 5:00	WS-6b Sustaining the VA Health Care System with DMAIC and KAR Methodologies Sharon Croteau, Dept. of Veteran Affairs, New England Health Care System			WS-9b Optimizing Performance and Wellbeing (Decoding Your Superhuman) Carlos Arce, Elation	
5:00 + Happy Hour	NETWORKING GATHERING/HAPPY HOUR: FREE HORS D'OEUVRES, CASH BAR IMMEDIATELY AFTER THESE SESSIONS -- AND SEE YOU TOMORROW AT THE SUMMIT! 				

Friday, August 11th – 2023 Lean Systems Summit

The *Lean Systems Summit* highlights Keynote Speakers and 15 learning sessions across healthcare, support services, manufacturing, government, and other sectors on how leaders and practitioners are using continuous improvement/Lean to change their culture, improve their way of doing business, and thrive!

7:5AM-8:15AM	Registration, Networking, Continental Breakfast				
8:15AM-8:45AM	Welcome: Darlene Dumont, Ph.D., LSSBB				
8:45AM-9:30AM	Opening Keynote: Carlos R. Arce, Chief Learning & Engagement Officer, Elation				
9:30AM-9:45AM	<i>Transition to Learning Sessions</i>				
(Room)					
9:45AM-10:45AM	A1 The Way to Improve, Problem Solve, & Innovate: Bayistate Health Daily Mgt. System Ghassan Saleh, Baystate Health	A2: How to Map Out Your Lean Warehouse Strategy Kevin Ledversis, Newcastle Systems	A3: IDEXX's Maturity Assessment Tool Missy Thebarge, Jim Bolstridge, Courtney Peterson, IDEXX	A4: Stop Training & Start Growing at the Individual Level Katie Bockwoldt, State of Vermont	A5 The Importance of Storytelling in Continuous Improvement Paul Critchley, NE Lean Consulting
10:45AM-11:AM	<i>Break - Change Learning Sessions</i>				
11:00AM-Noon	B1: Designing with Your Customer – Lessons in Empathy & Prototyping Megan Maxwell & Lisa Dewey-Mattia Port Authority of NY & NJ	B2: Playing Catchball at the local health system level Bridget Miller & Kelsey Robinson, Lincoln Health	B3: Sustaining the VA Health System with an Annual Assessment Tool Lisa Doyon, Melinda Davis, et al, VHA	B4: Personal Kaizen: Applying Lean for individual continuous improvement Steve Musica, Lean East	B5: Why Lean Works: The Solution to Human Nature: Business Mismatch Gavin Watson, CT Chapter of Conscious Capitalism
Noon-1:00PM	<i>Lunch (provided)</i>				
1:00PM-1:45PM	Afternoon Keynote: George Saiz, Writer, Coach. past President & CEO AME				
1:45PM-2:00PM	<i>Transition to Learning Sessions</i>				
2:00PM-3:00PM	C1: How to Build a Culture of Excellence in Healthcare Patty Morini & Aaron Sienkiewicz, et al, MaineGeneral Health	C2: Using Policy Deployment to Align Your Organization Bob Elliott, GBMP	C3: Building to CI Maturity – A Program's Journey Megan Maxwell, Lisa Dewey-Mattia Port Authority of NY & NJ	C4: Blue Q Goes "Ohno!" Expanding the Future Sergio Bencivenga, Bill Wright, Blue Q & Fred Shamburg	C5: Situational Leadership: When to Lead and when to Manage Robert Burke, VIP Group
3:00PM-3:15PM	<i>Transition to Closing Keynote - Refreshments</i>				
3:15PM-4:00PM	Closing Keynote: Alan G. Robinson, Author, Coach/Advisor, Faculty				
4:00PM-4:30PM	Wrap-Up -- Next Steps				
<i>See you next year on August 8 & 9, 2024!</i>					

Continuous Improvement Lean Collaborative

2023 Lean Systems Summit

Where Government, Services, and Manufacturing Meet

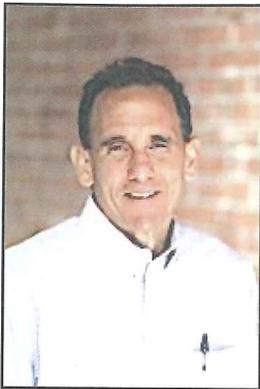
AUGUST 11, 2023

Opening Keynote Speaker

Carlos R. Arce

Chief Learning & Engagement Officer, Elation

Making the Invisible Visible



Carlos Arce is the company leader of Customer Experience at Elation – a company using neuroscience and mindset research to improve individual and organizational performance.

With over 20 years of expertise, Carlos has helped teams and companies improve the effectiveness of their leaders, organizational culture and employee wellbeing. Carlos has helped companies in a wide array of industries in both the public and private sector. He previously served as the Chief Learning Officer of a nationally recognized healthcare organization in areas of service, leadership, and quality.

He is an organizational development strategist and practitioner who understands the drivers and obstacles influencing healthy employee work culture and thriving operations. His expertise in optimizing human performance has transformed and improved a variety of organizational practices related to team effectiveness, multidisciplinary collaboration and workplace culture.

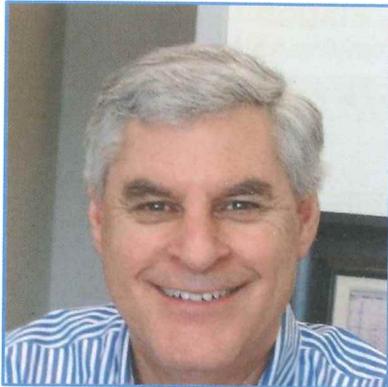
Most recently, he has combined his expertise from healthcare with applied neuroscience and mindset research to develop innovative approaches to improve professional wellbeing and address problems such as burnout and employee disengagement.

Mid-Day Keynote Speaker

George Saiz

Coach, Writer, & Past President/CEO of AME

Five Key Pieces—Plus One—to the Culture Puzzle



A practitioner and strong proponent of lean and continuous improvement since 1992, George Saiz speaks and works for enterprise excellence and people-centric leaders.

During a career spanning more than four decades, George has worked for a number of medical device manufacturing companies in increasing roles of responsibility from manager, director, general manager, vice president, owner and president. He has had significant experience in leading complex organizations and generating growth in sales and earnings.

He developed leadership strategies from his experiences as a medical device executive with Johnson & Johnson, Zimmer-Biomet, DJO Global and MicroAire. Given these and the best practices when President & CEO of The Association for Manufacturing Excellence (AME), he has learned the importance of including people in all business equations.

He provides real-life examples in his business novel, We Started with Respect.

Now, as a writer and coach, he promotes enterprise excellence through a people-centric culture to the next generation of business leaders.

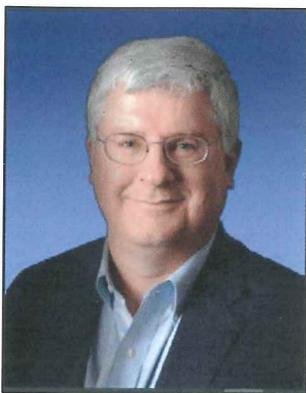
George earned his master's degree in business administration at the University of La Verne in La Verne, CA, and his bachelor's degree in business administration from West Coast University in Los Angeles.

Closing Keynote Speaker

Alan G. Robinson, Ph.D.

Author, Mentor, Educator, Faculty Isenberg School of Mgt. UMass

What the Private Sector Can Learn from Cutting-Edge Continuous Improvement in the Public Sector



Dr. Alan G. Robinson specializes in managing ideas, building high-performance organizations, creativity, innovation, quality, and lean production.

He has advised more than 300 organizations in twenty-five countries on how to improve their performance.

He is also the internationally known co-author of eleven books, many of which have been translated into more than twenty-five languages and have won many awards. Practical Innovation in Government is his latest book.

Robinson's bestselling, award-winning book, Ideas Are Free, co-authored with Dean Schroeder, was based on a global study of more than 150 organizations in 17 countries. It describes how the best companies go about getting large numbers of ideas from their front-line employees, and the competitive advantages they gain from this.

The 2014 sequel, The Idea-Driven Organization, also co-authored with Schroeder, is the result of 5+ years of further research in aly new set of organizations. The book was named the best book in 2014 on Management and Leadership by USA Book News.

Corporate Creativity, co-authored with Sam Stern, was named "Book of the Year" by the Academy of Human Resource Management. According to the Society of Manufacturing Engineers (SME), his 1991 book with Shigeo Shingo, one of the developers of the Toyota Production System, "remains a must-read for anyone interested in lean production."

Over the years, his research has been written about in almost every major newspaper in the United States, as well as a large number of business publications. He has been interviewed on numerous local and national radio and television shows.

He has served on the Board of Examiners of the United States' Malcolm Baldrige National Quality Award and on the Board of Examiners for the Shingo Prizes for Excellence in Manufacturing. Dr. Robinson is on the faculty of the Isenberg School of Management at the University of Massachusetts. He received his Ph.D. in applied mathematics from the Whiting School of Engineering at Johns Hopkins University, and a B.A. and M.A. in mathematics from the University of Cambridge.

He has also taught at St. Petersburg Technical University in Russia, the Athens Laboratory of Business Administration in Greece (affiliated with INSEAD), the Jagiellonian University in Poland, the University of Porto in Portugal, the Hanoi Business School, and Tianjin University in China.

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Pre-Summit Workshop Descriptions

Workshops - Thursday Aug 10

WS -1 Strategic Mastery: Leveraging Influence and Leadership Skills for Lean Problem Solving with a Customized Action Plan 8AM – Noon

This immersive 4-hour workshop is designed to help people bridge the gaps in their influence and leadership abilities. This transformative session is specifically tailored for individuals engaged in Lean problem-solving initiatives, empowering them to drive exceptional results.

This interactive session will focus on classic leadership challenges and develop action plans to address them. Through engaging discussions, breakout sessions, and practical activities, participants will gain a deep understanding of their current influence and leadership strengths, as well as areas that require development. By uncovering these skill gaps, participants will lay the foundation for growth and transformation.

Drawing upon lessons from the new book, *Picture Yourself a Leader: Illustrated Micro-Lessons for Navigating Change*, we'll work on creating a development plan customized to participants' unique needs. They will learn how to set clear objectives, identify actionable steps, and leverage relevant resources to enhance their influence and leadership proficiency. Whether it's improving communication, building relationships, or driving team collaboration, this workshop will equip people with the necessary tools and techniques to achieve their desired outcomes.

This workshop is built around the tenet of "Respect for People" and the principles of Lean and problem-solving. We'll explore how influence and leadership skills play a pivotal role in driving successful process improvement initiatives. By integrating these skills into a problem-solving toolkit, participants can become better catalysts for change, effectively leading teams towards sustainable solutions.

This workshop sets the stage for collaborating with like-minded professionals, sharing experiences, and gaining insights from industry experts. The goal is to empower participants to leverage their potential, maximize their influence, and become exceptional leaders within the Lean landscape. It's an opportunity to embark on a transformative journey towards strategic mastery.

Benefits

Expected results of the session for the attendee: benefits, impact, advantages/disadvantages,

lessons learned, key success factors, recommendations, perspectives, sustainability, understanding of transferability, etc.

By attending this workshop, you will be able to:

- Recognize the intangibles that get in the way of success
- Differentiate between process issues and people-centered issues
- Determine whether current operating methods still serve you
- Design adjustments to experiment with
- Create a strategic plan to build more successful habits.

Elisabeth Swan

President and CEO, Swan Consulting & Associates, Inc.



Elisabeth Swan is a keynote speaker, best-selling author, university Lean Six Sigma instructor, consultant, workshop coach, podcast host, and is passionate about embracing the humanity behind problem solving and honing people's leadership skills to drive operational excellence.

Recently named by the PEX Network as one of the top 50 OPEX Thought Leaders to follow in 2023, Elisabeth has consulted in the business process performance industry for over 30 years. Her experience spans from helping local non-profits expand their reach to guiding Fortune 100 companies through Lean Transformations. She has trained and mentored thousands of people in improvement projects generating millions in savings. She has deep experience coaching problem solvers and facilitating leadership retreats, strategic planning sessions, and kaizen events.

Elisabeth is the Co-designer and Lead Instructor for the Lean Six Sigma Leadership Course at University of California, San Diego (UCSD) and she also designs and runs Lean Six Sigma courses at UC Davis, and the University of Denver.

She is a Co-Founder of the learning nexus, Just-in-Time Café, and co-host of the Just-in-Time Café podcast. She's a Regional Board Member for the Association for Manufacturing Excellence (AME). Her latest book is the bestselling, *Picture Yourself a Leader: Illustrated Micro-Lessons for Navigating Change*, and she also co-wrote the *Problem Solver's Toolkit: A Surprisingly Simple Guide to Your Lean Six Sigma Journey*.

WS – 2a 8:00 AM – 10:00

TBA

WS – 2b Lean Maintenance for your Facilities' Maintenance Departments 10:00 AM - Noon

John Perrotti , VP, Fuss & O'Neill Manufacturing Solutions

Most organizations look at the Maintenance Department as an expense line item. Typically, budgets are established for annual costs of parts, labor, subcontractors, etc. Often during difficult financial times, companies reduce the budgets for maintenance and correspondingly, production is affected. Instead of the perception that Maintenance is an expense to business, let's look at it as a cost center.

By implementing Lean, your Maintenance/Facilities department can become more effective and productive within your organization. Examples of work performed using Value Stream Mapping will be presented, both before and after implementation tools.

John Perrotti

Vice President, Fuss & O'Neill



John Perrotti is a Vice President in our Manchester office and leads various disciplinary efforts for Manufacturing Solutions group. He is an expert in machine guarding and developing unique machine guarding solutions. He has performed machine hazard analysis utilizing lean concepts. He is an expert in electrical safety – NFPA 70E compliance and Lock Out / Tag Procedures. Mr. Perrotti has extensive knowledge within the metalworking industry, providing support solutions for regulatory compliance and methods for increasing production.

Mr. Perrotti is also a trainer for increasing production on client's factory floors. He has led many Total Productive Maintenance sessions. He has also performed training and support in Maintenance Manager 101, Troubleshooting Techniques, Set Up Reduction and Utilizing a Lean Approach to Safety.

WS – 3 8:00 AM - Noon System Thinking Your Lean Efforts: A Holistic Approach to Your Lean Transformation

Nancy DeSisto & Dr. Walter Lowell

Many continuous improvement efforts face significant barriers to **maintain** positive long term

forward momentum. An understanding of how *improvement efforts* interact within an organization's **system** provides new insights and tools to increase participants' influence on improving their organization. We invite **continuous improvement practitioners** to learn how **systems theory** impacts all aspects of an organization. This workshop offers the knowledge and skills to **reimage their organization as a system, not of authority, but of responsibility and communication that will make improvement interventions more successful**. This workshop is designed for Lean intermediates and advanced practitioners.

Implementation of continuous Improvement within our organizations has followed a path that has led from the seminal work of many forebears. To name a few: Dr. Shewhart (PDCA), Dr. Deming (14 points); Dr. Ashby, (Cybernetics); (Toyota Production); Stafford Beers (the Viable Systems Model); (TQM); Jim Womack (Lean); Lowell and Davis (Bend the Curve).

Many lean efforts fail to reach deep into an organization's systems to cement gains and build on successes.

The *traditional hierarchical organization does not allow the system* to adapt to and effectively deal with the complexity and variety of its environment. An organizational management must generate variety that is at least as great as the environment it is managing . This means that a system must have a sufficient range of responses available to deal with a range of situations that it may encounter. Delegation authority down to the people who know best what is happening assuming they have the capacity, autonomy, resources and skills to respond appropriately. Centralization risks losing important details about what is happening on the ground. Ability to respond quickly to an event (without getting permission from levels of management) maximizes your response. Best decisions are made closest to where the problem is.

This workshop offers Lean (CIP) practitioners the knowledge and skills to **reimage their organization as a system, not of authority, but of responsibility and communication that result in more successful improvement interventions**. This workshop assumes knowledge of Lean / Continuous Improvement methodology, includes pre-work and is highly participatory.

This workshop will help participants to:

- Consider how these natural systems' concepts play out in the universe and the world around us .
- Understand how system theory intersects with Lean / Continuous Improvement concepts in an integrated, coherent, and sequenced way;
- Explore how and when to increase and/or limit capacity and resources, to maximize decision making at the lowest level possible Using lean methods and principles to ensure key customer requirements are efficiently and effectively met.
- Explore how these ideas apply to your own work environment.

Nancy DeSisto – Principal, Continuous Improvement Group



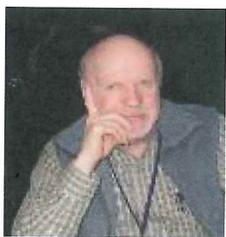
Nancy DeSisto is a principal in the Continuous Improvement Group specializing in helping teams with diverse interests to work together toward “dissolving” problems in complex situations.

Highlights include:

Executive Government Management (24 years): Special Assistant to Governor James B. Longley, State of Maine; Directed an integrated interdepartmental policy and program collaborative management effort to facilitate, coordinate and develop child policy for the State of Maine; Member of then Governor John McKernan’s Quality Management Council, Assistant to Commissioner & co-lead of the Department of Mental Health and Mental Retardation Quality Improvement effort; Assistant to Commissioner, Department of Human Services and principal in the State of Maine Bend the Curve Quality effort (runner-up in Harvard’s Ash Award for innovative ideas.

Quality Management, Organizational Development, Collaboration and Training (30 years) : Led 2 multi- year collaborative efforts managing 200 people in a network of interlocking committees to achieve our shared goal of Improved services for Maine’s special needs children and families; Trained hundreds of government and business organizational staff in quality improvement methodology. successfully facilitated nationally recognized collaborative efforts¹; and advised executives and managers in state government, local government and community organizations.

Dr. Walter E. Lowell, Principal, Lean Capitol, LLC



Dr. Lowell was the former Director of the Office of Lean Management for the Maine Department of Health and Human Services (DHHS) as well as being a leader in the State of Maine’s collaborative, interdepartmental, continuous improvement Bend the Curve (BTC) program. His responsibilities included the design and implementation of the Office of Lean Management for DHHS reporting to the Office of the Commissioner. The work included managing the Office, strategic planning,

Organizational Development, process improvement and working with staff at all levels of the organization, training and leading teams in Lean knowledge and methods including value stream mapping, Kaizen events and coordinating with other state agencies on Lean practices with savings in excess of \$4 million dollars. This work is described in the book: [Bending the Curve – Applying Lean Systems Thinking to Government and Service Organizations](#) written with his co-author Arthur Davis. As a leader in the Bend the Curve program Dr. Lowell was the founder of Maine’s Annual Lean Summit held each summer in Portland, Maine.

The *Bend the Curve* program received recognition and award as a —Bright Idea from Harvard University’s Kennedy School of Government — Ash Institute’s *Innovations in Government* program.

This work is described in the book: *Bending the Curve – Applying Lean Systems Thinking to Government and Service Organizations* written with his co-author Arthur Davis.

Walter believes that addressing the imperative challenge of improving services to individuals, families, organizations, and communities in Maine in an increasingly demanding environment requires a transformational change in organizations operations. He, along with colleagues, used Lean principles and methods to improve services within Maine State Government and Maine public services in general. Dr. Lowell was the Director of Information Services for the Department Biobehavioral during which he led an extraordinarily complex, innovative project, working with multiple stakeholders, to develop a unified, enterprise-wide, web-enabled information system. In his career as public servant he also held a number of different positions in State government including Director of Quality Assurance at the Augusta Mental Health Institute (now Riverview Psychiatric Center) and also served as Acting Superintendent for the Institute.

Since leaving public service, Dr. Lowell is President of Lean Capitol, LLC and continues to be actively involved in Lean and continuous improvement as an adjunct professor teaching Introductory Lean courses at the Lewiston Auburn Campus (LAC) of the University of Southern Maine and as a consultant in health care and education. Currently, he is a consultant to an innovative project at the university to develop a Lean Center in partnership with the LAC and the Androscoggin Chamber of Commerce that will support local area businesses in improving their operational efficiency using Lean/CI principles and methods.

Dr. Lowell earned his Doctor of Education from Columbia University in New York City. He was a professor at Memorial University in Newfoundland, Canada and completed post-doctoral work at Boston University Medical School. He has been a Certified Professional in Healthcare Quality (CPHQ) since 1998. In 2003, received his certificate as a Certified Continuous Improvement Practitioner (CIP).

WS – 4a 8:00 AM – Noon

TBA

WS – 4b Lean into Wellness 10:00 AM – Noon

Stefan Martiyan Director of US Environmental Protection Agency's Office of Continuous Improvement

Learn how to apply Lean and continuous improvement principles, tools and techniques to help improve your wellness and to help others, like friends, family and colleagues too. Lean thinking can help you achieve common day-to-day wellness goals, like getting enough sleep and exercise, and eating healthy, but can also help you achieve aspirational goals like running your first marathon or sustaining a healthier and improved lifestyle. Whatever the reason, attendees of this workshop will learn how to be intentional about their wellness, through six

easy steps, so they can live a better life despite global setbacks like OVID, and help others improve their wellness too.

In this workshop, Each attendee will be provided a brief overview of wellness and how it relates to Lean/continuous improvement tools and techniques. Workshop attendees will then go through a series of separate but interrelated presentations, discussions, and smaller group breakout sessions to not only learn about Lean-ing into wellness, but also learn about ways to apply that knowledge and learning in real time to their own wellness.

The workshop agenda is as follows: 1) wellness overview and 1st breakout session focused on identifying each attendee's top 2-3 categories: 2) wellness goals, metrics and targets and 2nd breakout session so each attendee can workshop a wellness goal as well as a related metric and target: 3) monitoring wellness and problem solving and 3rd breakout session where smaller groups problem solve using 5 Whys and/or fishbone diagram to get to the root cause of a wellness related problem: 4) wrap up, share additional wellness resources and a personal story related to using Lean/continuous improvement tools to achieve an aspirational wellness goal.

Also, the workshop is designed to help attendee's coach others in their home, place of work or communities, to help the greater good improve in the wellness space.

Stefan Martiyan

Director, US Environmental Protection Agency's Office of Continuous Improvement (OCI)



OCI's mission is to help EPA continuously improve and systematically achieve measurable results through agency wide use of Lean management system.

In addition to supporting EPA's operations or organization excellence, over the past few years, Stefan has explored how Lean and continuous improvement tools relate to improving wellness and he has gained insights and experience with individuals and teams to help them improve their overall well-being.

As a testament to Lean thinking in the wellness space, and by applying what he has learned to his own wellness goals, Stefan successfully ran over 100 miles in mountains, uninterrupted and without any support. His passion for continuous improvement and wellness have led to helping others achieve their wildest goals, by using Lean tools, to live their best life.

WS – 5 Shingo Model Overview 8:00 AM – Noon

Bob Elliott Greater Boston Manufacturing Partnerships (GBMPO)

In this workshop we will speak about Shigeo Shingo and the Shingo Prize. After a brief history of Shingo and the prize we will describe the parts of the Shingo Model. This workshop will discuss what happens if we only focus on tools and not behaviors. We will further our discussion on Culture and

introduce the importance of individual behaviors and how ideal behaviors can drive ideal results. The Shingo Model has identified three insights that will help us to connect behaviors, systems, purpose, tools, and results.

From there we will go over the 10 Guiding principles of the Shingo Model. By the end of the lecture attendees will understand that the social side of Lean (the culture) can have as much influence on our ability to get results as the tools we apply can

Bob Elliott

Continuous Improvement Manager. GBMP



Bob Elliott is a Continuous Improvement Manager at GBMP and a Certified Shingo Institute Workshop Facilitator.

Bob has facilitated training and implementation of Lean Principles in many World-Class organizations including Raytheon, Drager Medical, Flexcon Industries, Mersen, Norfolk Southern Railroad to name a few. The training and implementation in these organizations has resulted in reduced lead-times, quality and productivity improvements and cost reductions. Check out some of his case studies showing examples of these types of improvements at Dacon Construction, Accurounds and Innovent Technologies on our About Us page .

Bob's training and coaching abilities are not limited to manufacturing; he has worked with many Healthcare organizations including Concord Hospital, Lowell General Hospital, Mass General, Emerson Hospital and Somerville Hospital. He has also worked with service industries such as Mass Mutual Insurance Company and Dacon, a design & construction architectural company.

Bob has been a frequent speaker/presenter at SME's Eastec, a New England manufacturing exposition held in Springfield MA and was also a guest speaker for the Worcester chapter of SME. Bob has presented at GBMP's annual Northeast Lean Conference and has been involved with the Shingo Prize as an examiner for Shingo applicants like Raytheon and Snap-On Tools. Bob, a former GBMP client and Board of Directors member has been involved with GBMP since the early 1990's. Bob has held top-level Operations Management positions at several local Massachusetts companies. Bob holds a BS in Operations Management from Northeastern University in Boston.

WS-6a To Drive Growth in Today's Business Environment, You Need Inclusive Leadership 1:00 PM – 3:00 PM

Leili McKinley, Founder and CEO of THE Identity Group, LLC

Inflationary pressures and economic stress are creating a new normal for management. Forced to look for new ways to engage employees to drive growth, business and government leaders need inclusive leadership skills. Repeated studies have shown that collaborative work cultures where teams are empowered by safety and resiliency are most productive. Focus on growth now means a focus on the employer and employee relationship. New Inclusive Leadership methodologies show how to adapt to these challenges and effectively navigate through them.

We will discuss:

1. Economic and inflationary pressure, shifting demographics, declining labor participation rate.
2. How "new normal" workforce expectations are changing leadership strategies.
3. Mitigating poor performance due to conflict and upheaval.
4. Evidence-based inclusive leadership skills required to adapt.

As inflation and economic pressures continue to challenge business and government growth and efficiency. These difficult times are intensified by dramatically changing societal demographics, a declining labor work force rate, and permanently shifted workforce expectations. In the current crisis layoffs are the typical go-to solution, but research shows there's a better answer.

Organizations need to rethink their leadership development strategies. To survive, stay competitive and achieve results, management must focus on workforce engagement with long-term commitment to increasing diversity, building trust, developing resiliency and ensuring safety.

During this workshop you will discover specific inclusive leadership skills to help you navigate through conflict and upheaval. A new leadership methodology called Inclusion Capital sheds light on how to motivate today's labor force, drive productivity, and ensure sustained revenue growth. You will learn how to engage and inspire teams, increase employee commitment, deliver productivity, and develop your inclusive leadership

Leili McKinley

Founder and CEO of the Identity Group, LLC



Leili McKinley is a:

- SME in DEI, Inclusive Leadership, and Brand Advocacy
- Develops DEI Strategy and Planning
- Facilitates training in DEI and Inclusive Leadership

Leili McKinley is on a mission to educate leaders about the intersection of Inclusive Leadership and Brand Advocacy. They come together in a company's culture to form the foundational fabric of the IP called Relational Capital.

She is a member of the National Diversity Council. She is also a recipient of the Stanford University Certification in Leveraging Diversity and Inclusion for Operational Excellence.

Leili is a serial entrepreneur honored by the SBA and award-winning designer. She is a three-times founder with a successful track record building, growing and selling brands.

As the architect of several DEI Strategies, Leili has helped over 2,000 people become advocates and participants in the foundational change in their organizations, fostering plans that implement new processes and structures, from top to bottom.

As an Executive Coach, she has guided C-Suite executives to achieve their vision, from the CEP of a \$100M organization to a start-up. As a trainer, she has worked with Boards, Executives and Managers creating engaging content that has won her repeated clients. She has trained organizations from 30 members up to 750 members. Cisco, ICF Next, Weston & Sampson, and the Professional Businesswomen of California (PBWC).

WS – 6b VA Health Care System's Sustaining People Change Management – Using DMAIC & KAR Collaboration 3:00 PM – 5:00 PM

Sharon Croteau, Program Manager, Systems Redesign and Improvement
Veterans Affairs New England Health Care System

One pitfall of an Improvement project, is that while we work hard on "fixing" the process, we have completely forgotten that the people directly impacted must also change. Through the use of proven change management techniques, the Department of Veterans Affairs New England Health Care System has been able to sustain the majority of improvement projects at all eight facilities and over 40 outpatient clinics.

Many Teams work on improvement projects and are able to celebrate when they reach the goal. Why then, do so many projects fail afterwards? By utilizing DMAIC (Define-Measure-Improve-Analyze-Control) in conjunction with ADKAR (Awareness-Desire-Knowledge-Ability-Reinforcement) sustainment of improvement projects is more successful. Participants will learn about this collaborative approach through case study and practical applications.

Attendees will learn of one successful approach to sustainability of an improvement project. Attendees will also become more familiar with Lean Six Sigma DMAIC roadmap and Change Management ADKAR concepts.

Sharon Croteau

Program Manager, Veteran Affairs New England Health Care System



Sharon Croteau has been the Program Manager for VA New England Health Care System for just over three years. In this role, she coordinates training, coaching and improvement projects in all six New England states working with the Systems Redesign Coordinators at eight VA facilities. She has worked on many Improvement projects in her career at the facility, regional and national level. She earned her Lean Six Sigma Black Belt just over seven years ago and has been working towards her Lean Six Sigma Master Black Belt. She has a passion and enthusiasm for Improvement and is a trained and certified facilitator and coach.

WS – 7 Learning Lean From a Bunch of Nerfballs 1:00 PM – 5:00 PM

Fred Shamburg, President Leanovations, LLC

Back by popular demand this workshop was a hit in 2013, 2014 and 2017; we are happy to announce Leanovations is returning with their Nerf Balls for 2023 Pre-Summit. The Nerf Ball Factory is a very fun hands-on interactive simulations workshop. Grasp and apply basic lean concepts like flow, standard work, takt, and pull systems, along with advanced concepts of Lean Leadership for successful Kaizen teams.

The Nerf Ball Factory simulation is a hands-on learning experience and an ideal introduction to Lean Manufacturing and the Toyota Production System principles that can be applied in any enterprise (Manufacturing, Healthcare, Government, Service, etc.). Fred Shamburg, President, Leanovations will present the basic Lean principles, elements, and techniques and how they interact to help an organization "Profitable Grow."

Participants will operate a simulated factory and then redesign through two (2) short kaizen team events with newly learned Lean principles. The participants then operate their new implemented factory and measure the key performance indicators and experience the improved results. They will learn the 5 Key principles of the Toyota Production System (TPS), the importance of Standard Work, developing employee skills, having Key Performance Indicators (KPIs), and experiencing the Kaizen Team approach to improve their processes.

The participants will see the "opportunities" and how critical Lean Leadership is in engaging and empowering the employees to ensure the organization's success. The participants will learn, among other things, the importance of eliminating wastes to create flow where possible and pull where flow is not possible, along with the value of a visual factory.

This workshop will provide the emotional and intellectual framework for understanding Lean. Leanovations will lead a discussion on exploring leadership issues in the context of Lean Transformations and other situations where radical change in behavior and culture is necessary. No matter what your Lean experience, knowledge or practice level is, this is a "don't miss"

Workshop!!!! Everyone who attends will leave with an abundance of new Lean learning.

The learning experience truly has all the “real world” examples of what happens in a traditional “push” style factory with no employee engagement and allows the participants to build a teamwork approach from the Lean training they had by Leanovations prior to embarking on the factory simulations.

This workshop will be “an eye opener” even for the most experienced Lean practitioner. This is a hands-on, very fun, interactive simulation that requires the teams to make “Nerf Balls” in their factory meeting the needs of their demanding customer and compete against a low-cost country competitor.

This workshop provides an experiential simulation for an ideal introduction to Lean Manufacturing and the Toyota Production System principles that can be applied in any enterprise (Manufacturing, Healthcare, Government, Services, etc.). It presents basic Lean management principles, elements, and techniques and how they interact. This workshop will be “an eye opener” even for the most experienced Lean practitioner – all that is needed is an open mind to new ideas and learning new leadership concepts.

Fred Shamburg

President, Leanovations, LLC



The founder and President of Leanovations, LLC was introduced to lean by one of the originators of the “Toyota Production System”, and very quickly developed a passion for teaching and applying lean principles to the total business enterprise with over 30 years’ experience in leadership and executive level positions for multinational corporations. Experience working with organizations in diverse industries that include aerospace, medical, automotive, chemicals, government, and service organizations. The Board of Examiners for the National Shingo Prize selected Fred, as a Shingo Prize Examiner in 2007. A frequent guest speaker at business conferences, Fred has taught Lean worldwide and in all regions of the U.S., with experience in over 20 countries and 30 states. Recognized as an international leader in successfully implementing Lean and Innovations, where Lean plus Innovations equals Leanovations.

Facilitators



Sergio Bencivenga, Blue Q Warehouse Manager, Co-Lean Leader

Sergio began his career as a purchasing assistant with Blue Q over 20 years ago. In 2009 he became the Purchasing Manager and then became the Warehouse Manager for Blue Q in 2013 leading a staff of 12. As the Warehouse Manager, in April 2013 Sergio was introduced to Lean while touring a display manufacturer in Connecticut that was working with Leanovations at the time. Realizing the potential of Lean and the amazing process of teamwork, he sold the Blue Q owners (Mitch & Seth Nash) to bring

Leanovations and LEAN to Blue Q, having their first Lean Team Event in April 2014 on the warehouse picking line. The first Lean event immediately improved efficiency by 30% and helped to cement the Leanovations (Lean + Innovations) process into the culture of Blue Q! Applying and sustaining Lean and Innovations and conducting multiple Kaizen Team events, Blue Q has averaged over 20% in increased sales/year over the last 9 years, while growing employment in the warehouse by 233%.



Bill Wright, Blue Q
Operations Leader, Co-Lean Leader

Bill started his career at Blue Q over 14 years ago in Operations. Bill has been involved in various opportunities at Blue Q to include customer service, photography, marketing and now as an Operations Leader. Bill was the first Team Leader of Leanovations event in April 2014, and he developed a craving for Lean and a culture of Teamwork. Since that first Lean event, Bill has led the way at Blue Q, always leading by example and looking to implement processes to enhance work flow and improve the overall efficiency of the company, to meet the ever-increasing customer orders. Bill as a Co-Lean Leader working with the Warehouse Team for the past 9 years, has successfully implemented various projects, leading to significant improvements in energy efficiency and the overall growth of the company. Bill is always excited to share his positive experience and knowledge with other Lean practitioners, assisting them in applying Lean and Innovations to their organization to achieve profitable growth and a culture of teamwork.

WS – 8 Learn to See and Understand 1:00 PM – 5:00 PM

Anne Frewin, Senior Continuous Improvement Manager, Archer Daniels Midland (ADM)

Value Stream Mapping can seem complicated with its icons, legends, and lines. Sometimes simplifying the process make problems much easier to see. In our organization, we use 6 boxes to map out a high level value stream, we define the health of each step, we identify pain points, we determine next steps or quick wins, and we define metrics to show gaps. In this workshop, you will learn how to do this more simplified version of value stream mapping and be able to take it back to your organization and help others learn to see and understand the health of their value stream and where problems lie.

This workshop will start with an overview of our CI strategy focusing particularly on the Learn to See Big Rock. We will then deep dive into how to develop a 6 box value stream map. Learners will see a completed map that is non-organization/non-industry specific and will involve practice on each step along the way. The process will include mapping the value stream, identifying pain points, identifying ideas, prioritizing ideas, and defining process and outcome metrics connected to the value stream. At the end of the workshop, learners will have enough skill to take it back to their organization and apply it to their own work.

Anne Frewin

Senior Continuous Improvement Manager

Archer Daniels Midland (ADM)



Anne is driven to inspire all whom she meets to be more than they think they can be and do more than they think they can do. Over the last 12 years she has put this into practice helping teams see their work differently and then find ways to improve their work using Lean/TPS methodologies. She has worked with front line to executive in healthcare, manufacturing, reference laboratories, and now with administrative/support services. She uses Lean to help people improve themselves, their interactions with those around them, and their processes. Anne has a Master's degree in Organizational Leadership from St. Mary's University of Minnesota and a Master's degree in Healthcare Administration from the University of Minnesota. She lives in Maine with her spouse and Goldendoodle, Mojo.

WS-9a 1:00PM – 3:00 PM

TBA

WS – 9b Optimizing Performance and Wellbeing: Decoding Your Superhuman
3:00 PM – 5:00 PM

Carlos R. Arce, Chief Learning and Engagement Officer, Elation

The workshop begins with a focus of human performance including some of the misunderstandings and misconceptions that undermine efforts to improve workplace wellbeing.

This includes:

- Differentiating properties between mechanistic and human systems.
- The role of the unconscious brain.

Followed by a description of the fundamental features of the brain/body system including:

- Rhythms (Sleep, Nutrition, Movement, Mindfulness)
- Daily Energy (Physical & mental energy, attention, focus)
- Meaningful Social Connection (The Importance of the social brain)
- Performance Accelerators and Decelerators (The mindset and attitude)

These concepts and their complex dynamic interactions are explored throughout the workshop with the understanding that "everything affects everything".

The final workshop activity provides attendees the opportunity to collaboratively explore the unique challenges that may be undermining their own wellbeing and performance potential.

This workshop is designed to be highly interactive by using dyad and small group conversations. As a result, participants will collaborate and interact with several different attendees.

Attendees will:

- Understand how brain/body system performance influences individual and group performance.
- Explore which organization practices enhance wellbeing and which undermine the ability of a workforce to adapt and thrive.
- Discuss how the science of human performance can be applied to renew and enhance workforce wellbeing.

Carlos R. Arce

Chief Learning & Engagement Officer, Elation



Carlos Arce is the company leader of Customer Experience at Elation – a company using neuroscience and mindset research to improve individual and organizational performance.

With over 20 years of expertise, Carlos has helped teams and companies improve the effectiveness of their leaders, organizational culture and employee wellbeing. Carlos has helped companies in a wide array of industries in both the public and private sector. He previously served as the Chief Learning Officer of a nationally recognized healthcare organization in areas of service, leadership, and quality.

He is an organizational development strategist and practitioner who understands the drivers and obstacles influencing healthy employee work culture and thriving operations. His expertise in optimizing human performance has transformed and improved a variety of organizational practices related to team effectiveness, multidisciplinary collaboration and workplace culture.

Most recently, he has combined his expertise from healthcare with applied neuroscience and mindset research to develop innovative approaches to improve professional wellbeing and address problems such as burnout and employee disengagement.

WS- 10 Thinking Beyond Technology with Less Software and Delighting Customers 1:00 PM – 5:00 PM

Ken Eakin, Senior Consultant, Lean Agility, Inc.

Craig Szelestowski, Founder, Lean Agility, Inc.

In both commercial industry and government, there is an epidemic of over-delivering software solutions. Afraid of being left behind by "Industry 4.0", organizations constantly go shopping for software features without first truly understanding the business problems they are trying to solve. As a result, nearly every software project consumes far more time, money, and effort than necessary.

For instance, one client's IT department recently told us that it typically approves 80 projects per year but completes only 15. Research from the Standish Group says that close to 60% of all software features are rarely or never used. It also claims that 84% of all IT projects fail or partially fail.

By focusing on understanding critical business problems first, a CIO, with Lean Agility's help, recently reduce 500 pages of requirements to just 111. Six months after that, he, his team, and their business clients celebrated the successful implementation of a slimmer, better software package, years ahead of schedule and well under-budget.

In this workshop we cover:

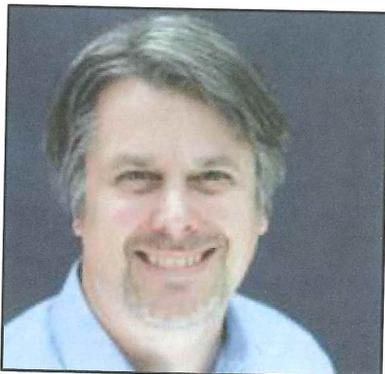
- Why software solutions are often over-delivered
- The cost of over-delivery
- Identifying the business outcomes desired by the software solution
- Creating an effective problem statement
- Determining the relationships between symptoms and root causes of business problems.
- Distinguishing between value demand versus failure demand, and quantifying cost of the latter.
- Distinguishing between algorithmic vs heuristic work and understanding how software can-- Save time, money, and effort in executing your organization's IT projects

Results:

- Deliver new software to your business faster and cheaper
- Learn how to improve processes through technological and non-technological (process) interventions.
- Learn how to apply Lean techniques to any business problem (IT or otherwise) to solve it more effectively
- Build more depth to your current practice of Agile/Scrum methods by integrating Lean problem-solving techniques at the beginning of a project

Craig Szelestowski

Founder, Lean Agility, Inc.



Craig Szelestowski is a Lean/Agile transformation specialist with more than two decades of experience implementing dramatic turnarounds. He founded Lean Agility Inc. in 2010 to apply Lean exclusively to knowledge work / government organizations.

He is widely regarded as one of Canada's leading experts on the application of Lean to both knowledge/project-based work as well as to more transactional work such as permits and applications and has a finely tuned sense of how executives can transform their own work to get more done while living and working in balance.

With his coaching, his clients have reduced delivery times by up to 95%, increased capacity by up to 400% and created outstanding levels of employee engagement.

In his public service career, as Vice President of Human Resources, Lean and Quality, he led the Royal Canadian Mint's Lean transformation which helped move the organization through a challenging era of cutbacks and job losses into an extended period of financial and organizational health and stability. During his tenure, the Mint realized tens of millions of dollars of Lean improvements, dramatically reduced the time and effort to deliver its products and services, moving from a financial loss to a profit of over \$68 million. In terms of employee engagement, it improved from 100 grievances per year to 20 per year and was named by Maclean's magazine as one of "Canada's Top 100 Employers" from 2007 to 2010.

Craig has led the development of Lean Agility's training curriculum including White, Yellow, Green and Black Belt Certification, Lean Document Creation and Approval, Results – Not Resistance, Lean Management Systems and Lean Strategic Planning and Deployment.

Craig has served multiple times as a part-time professor at the Telfer School of Business at the University of Ottawa. He is currently the Director of Lean content at the Telfer Centre for Executive Leadership and has taught Lean to Telfer's MBA students. He is a contributor to Canadian Government Executive magazine and various other publications, contributing both articles and podcasts. He founded the annual Lean Government Summit in 2011

Ken Eakin

Senior Consultant, Lean Agility, Inc.



Ken is author of *Office Lean: Understanding and Implementing Flow in Administrative and Professional Environments* (CRC Press, 2020). He currently works as a lean consultant, coach, facilitator, and trainer at Lean Agility, specializing in office and knowledge work.

Prior to consulting, he held various positions in his 20+ year working career, including Senior Advisor of Operational Excellence at Export Development Canada and Process Improvement Manager with Maersk Line.

He holds an MA from the University of Wisconsin-Madison and an MBA from the Rotman School of Management at the University of Toronto. He teaches part-time in the MBA program at the University of Ottawa's Telfer School of Management.

Friday, August 11th – 2023 Lean Systems Summit

The *Lean Systems Summit* highlights Keynote Speakers and 15 learning sessions across healthcare, support services, manufacturing, government, and other sectors on how leaders and practitioners are using continuous improvement/Lean to change their culture, improve their way of doing business, and thrive!

7:5AM-8:15AM	Registration, Networking, Continental Breakfast				
8:15AM-8:45AM	Welcome: Darlene Dumont, Ph.D., LSSBB				
8:45AM-9:30AM	Opening Keynote: Carlos R. Arce, Chief Learning & Engagement Officer, Elation				
9:30AM-9:45AM	Transition to Learning Sessions				
(Room #)	#1	#2	#3	#4	#5
9:45AM-10:45AM	A1 The Way to Improve, Problem Solve, & Innovate: Baystate Health Daily Mgt. System Ghassan Saleh, Baystate Health	A2: How to Map Out Your Lean Warehouse Strategy Kevin Ledversis, Newcastle Systems	A3: IDEXX's Maturity Assessment Tool Missy Theborge, Jim Bolstridge, Courtney Peterson, IDEXX	A4: Stop Training & Start Growing at the Individual Level Katie Bockwoldt, State of Vermont	A5 The Importance of Storytelling in Continuous Improvement Paul Critchley, NE Lean Consulting
10:45AM-11:AM	Change Learning Sessions				
11:00AM-Noon	B1: Designing with Your Customer – Lessons in Empathy & Prototyping Megan Maxwell & Lisa Dewey-Mattia Port Authority of NY & NJ	B2: Playing Catchball at the local health system level Bridget Miller & Kelsey Robinson, Lincoln Health	B3: Sustaining the VA Health System with an Annual Assessment Tool Lisa Doyon, Melina Davis, et al, VHA	B4: Personal Kaizen: Applying Lean for individual continuous improvement Steve Musica, LeanEast	B5: Why Lean Works: The Solution to Human Nature: Business Mismatch Gavin Watson, CT Chapter of Conscious Capitalism
Noon-1:00PM	Lunch (provided)				
1:00PM-1:45PM	Afternoon Keynote: George Saiz, Writer, Coach. past President & CEO AME				
1:45PM-2:00PM	Transition to Learning Sessions				
2:00PM-3:00PM	C1: How to Build a Culture of Excellence in Healthcare Patty Morini & Aaron Sienkiewicz, et al, MaineGeneral Health	C2: Using Policy Deployment to Align Your Organization Bob Elliott, GBMP	C3: Building to CI Maturity – A Program's Journey Megan Maxwell, Lisa Dewey-Mattia Port Authority of NY & NJ	C4: Blue Q Goes "Ohno!" Expanding the Future Sergio Bencivenga, Bill Wright, Blue Q & Fred Shamburg	C5: Situational Leadership: When to Lead and when to Manage Robert Burke , VIP Group
3:00PM-3:15PM	Transition to Closing Keynote - Refreshments				
3:15PM-4:00PM	Closing Keynote: Alan G. Robinson, Author, Coach/Advisor, Faculty				
4:00PM-4:30PM	Wrap-Up -- Next Steps				
See you next year on August 8 & 9, 2024 !					

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Learning Session Descriptions

9:45 AM – 10:45 AM

A1: Baystate Health Daily Management System (DMS): The Way to Improve, Problem Solve and Innovate

Ghassan Saleh – Manager, Operations Excellence, Baystate Health

Baystate Health (BH) has embarked on a journey of continuous improvement by making a commitment to roll out DMS across all areas. The most visible elements of such a structured system are: a) Daily Tier Huddles; b) weekly leader rounding to visit each area in the hospital. The standard content of the huddles (measures, SPESS issues: good catches, communication, recognition, and situation awareness data) provides a great opportunity for ease of rolling out, training, coaching and sharing lessons learned and knowledge gained. This session will introduce BH DMS structure to its audience. The session will share details of approach, technique and content of those huddles and the infrastructure to make it happen.

Results:

SPESS - Safety, Process, Equipment, Supplies and Staffing

Ghassan Saleh

Manager, Operations Excellence – Baystate Health



Ghassan leads a team of 7 improvement specialists that are tasked with rolling out the DMS across Baystate Health.

He is a Lean Six Sigma Master Black Belt with a Master's Degree in Health Management, Planning and Policy. He is also a dentist with over 24 years of experience in healthcare, the last 12 years of which have been focused on process improvement and project management in government and in private sector healthcare.

When people ask me about my shift from dentistry to process improvement, I usually say: "I used to drill deep into teeth until I hit a clean dentin to build my filling. Now I drill deep into problems until I hit a root cause to build a solution on top!"

A2: How to Map Out Your Lean Warehouse Strategy

Kevin Ledversis, VP Newcastle Systems

These are tough times to run a warehouse. Product must get to your customers faster... so how will you do it? Before investing in automation or hiring more workers, it's imperative to audit your current processes. Small and consistent improvements can boost your operational efficiency through better process flow that reduce bottlenecks, downtime, and maximize your profitability.

The lean tips and techniques shared in this session can help you get your warehouse on its way from cost center to profit center. You will learn:

- Basics of lean warehousing
- Metrics and benchmarks of world class companies
- Simple tips that can improve your process to take in more product, expedite put away and picking, and get product out the door faster
- The magic formula for labor retention and employee satisfaction

Benefits:

- Learn timely, low-cost process improvement tips for your warehouse that will help you take in more product, expedite put away and picking, and get more product out the door faster
- Learn how to engage your warehouse workers – they'll be 30% more productive and will appreciate you for it.

Kevin Ledversis

VP, Newcastle Systems



Kevin serves as VP of Sales at Newcastle Systems and helps customers identify where and how process improvements can be made in warehouse operations using bar code technology. He has over 30 years of experience within the Automatic Identification and Data Capture (AIDC) industry.

Prior to joining Newcastle Systems, he worked in sales for Weber Labeling Solutions, Intermec and Printronix where he developed solutions for complex labeling applications in a variety of verticals such as distribution, manufacturing, healthcare and retail.

Kevin earned his MBA from University of Hartford and a bachelor's from Bryant University. He received his Lean Bronze from GBMP, sits on the Regional Board of AME.

A3: Lean Maturity – How IDEXX is using a baseline tool that is derived from the Shingo Model

Missy Thebarga – Scientist / ISOL

Jim Bolstridge – Process Engineer / ISOL

When bringing an organization along in a Lean journey, it's important to acknowledge that not all teams within those walls are moving at the same pace in their understanding and application of Lean tools and methodologies. It is imperative to assess where teams are in their journey by gathering baseline data to more accurately gauge where our attentions ought to be from a coaching perspective. The LMA process gives Lean coaches a tool to examine team process, pinpoint more selected efforts for practicing Lean, and provides a roadmap for each team for the next year or two until a reassessment can be performed. The session will go over why and how IDEXX developed their Lean Maturity Assessment program and what value has been to the Lean culture.

Results:

- What IDEXX Lean Culture looks like in the Operations Division
- Why IDEXX created the LMA Program and how they incorporated the Shingo Model
- What the LMA framework is: logistics, positioning with the teams, tools and methodologies
- How the program has evolved from concept in 2018 to today's structure (PDSA)
- Why the LAM process is valuable and how they are used in the operation
- Discussion about implementing a similar program within their own organizations

Missy Thebarga

Scientist / ISOL



Missy Thebarga is a graduate of the University of New England with a degree in Medical Biology and has been working as a scientist at IDEXX for the past 20 years.

In addition to her laboratory work, she is an ISO 9001:2015 and 14001:2015 certified auditor for IEXX and a mentor to other employees on a Lean journey of their own.

Her own Lean journey began about 15 years ago and is ever ongoing. Continuous improvement is very important at IDEXX and affords endless leaning opportunities and experiences to expand Lean knowledge.

Jim Bolstridge

Hematology Process Engineer, IDEXX



Jim is a Hematology Process Engineer celebrating 20 years at IDEXX this year!

After 6 years in the US Navy, his career has focused on service and manufacturing a wide range of veterinary medical instruments as a Technician, Production Supervisor and Process Engineering Support.

He has been a Lean mentor in the production organization as well as getting more involved in Lean coaching in other areas of the IDEXX.

A4: Stop Training & Start Growing at the Individual Level

Katie Bockwoldt, Performance Improvement Advisor, State of Vermont

We all know that training is an important aspect of building a culture of continuous improvement and it's often one of the first things we turn to when attempting to develop a continuous improvement program, but it's only mildly effective when done in isolation or when the concepts feel theoretical. Without a mechanism for applying knowledge gained in real scenarios and getting support when needed, gains from training can quickly disappear. When the training stops, we need to have some way to help the individual gain competency and proficiency over time.

In this session we will share what Vermont has been doing to make the transformation from training to professional development and will share stories from the individuals who have been impacted by this shift. We will discuss our training framework and skill development model it's based on, the different avenues we've developed for people to practice and continue to learn, and the coaching that has been occurring in various departments. We'll also touch on the ways that we've been combining more traditional continuous improvement training which is more theory and concept based with technical training as it relates to software applications for knowledge work.

Results: You will—

- Gain an understanding of the Dreyfus Model of Skill Acquisition,
- Learn about new ways to develop staff and improve results,
- Reflect on your own training/training programs and
- Identify ways they might be improved.

Katie Bockwoldt

Performance Improvement Advisor, State of Vermont



Katie Bockwoldt is a Performance Improvement Advisor in the Vermont Agency of Administration's Chief Performance Office.

Katie manages the State of Vermont's Continuous Improvement Training Program and works directly with individuals and teams to elevate their processes, strategies, and overall performance.

She is dedicated to driving organizational excellence and helping the State of Vermont meet the needs of all Vermonters.

A5: The Importance of Storytelling in Continuous Improvement

Paul Critchley- President, New England Lean Consulting

Telling stories is one of the most powerful methods that leaders have to influence, teach, and inspire people. Beyond numbers, goals, and KPI's, stories help to convey the culture and values that can unite and inspire everyone within the workplace. In this session, we'll learn more about how storytelling can help garner support Lean by making it more tangible and more relatable for those faced with practicing it.

Results:

BY understanding the genuine power of authentic Storytelling, it helps people understand what Lean is truly about, and thus will help get people more engaged. Likewise, it directly supports Respect for People by showing vulnerability, openness and a willingness to "meet people where they are".

Paul Critchley

President, New England Lean Consulting



Paul Critchley is a recognized thought leader on employee engagement and continuous improvement, and has helped businesses around the world achieve greater levels of success through the application of Lean techniques.

As a frequent speaker, he has keynoted at numerous corporate events, as well as at international conventions such as AME's annual Lean conference and at OpEx Week. He's also the host of "the New England Podcast", a weekly show that focuses on Lean leadership and New England based businesses.

Paul is a former Board Member of the Northeast Region of AME, holds a B.S. in Mechanical Engineering, a M.S. degree in Management and a M.S. in Organizational Leadership.

He is passionate about Lean and creating organizational cultures that are sustainably engaged. He co-authored his first book, "The Whole Professional, A Collection of Essays to Help You Achieve a Full and Satisfying Life" to bring a fresh perspective on Work/Life Balance and how individuals and organizations can work together to achieve greater levels of attainment.

11:00 AM – Noon

B1: Designing With Your Customer- Lessons in Empathy and Prototyping

Megan Maxwell – Program Manager, Office of Continuous Improvement
Port Authority of NY & NJ

Lisa Dewey-Mattia
Director of Continuous Improvement
Port Authority of NY & NJ

Designing with your customer rather than merely for your customer is integral in achieving impact in process improvement efforts. The session will begin with a warm-up activity that will introduce the themes for the session-continuous improvement and empathy. We will then cover how empathy for customers (internal and external) and continuous improvement are connected and how empathy can be practiced throughout the continuous improvement cycle (regardless of which methodology you are using-lean, design thinking, or something else), with a special focus on the prototyping and testing of solutions. The session will close with lessons from our own experiences designing with customers.

Results:

The objective of the session is to reinforce the benefits of practicing empathy and designing with your customers, and lessons learned from prototyping solutions.

Megan Maxwell

Program Manager, Office of Continuous Improvement, Port Authority-NY & NJ



Megan is currently a Program Manager in the Office of Continuous Improvement (OCI) at the Port Authority of New York and New Jersey. Her work focuses on collaborating with departments on process improvements, customer experience initiatives, and strategic alignment, with a focus on using design thinking and lean tools. While in OCI, Megan has facilitated CI efforts that have identified improvements in both back-office processes such as contract authorizations and journeys for the travelling public such as social distancing interventions. For the past two years, she has focused her facilitation support towards improving the experience of minority and women-owned businesses that seek to do business to the agency. In addition to supporting CI efforts, Megan focuses on developing capacity building programs to increase the use of CI tools and concepts in everyday work. Engagement with CI training has doubled since 2019.

Megan has also worked in Security Performance, Policy, Planning, Enterprise Risk Management, and Aviation at the agency. Prior to joining the Port Authority, Megan worked in non-profit arts organizations. She has a Bachelor of Arts in Political Science and International Relations and Master of Public Administration from the University of Southern California and a Juris Doctor from Santa Clara University.

Lisa Dewey-Mattia

Director, Office of Continuous Improvement, Port Authority of New York & New Jersey



Lisa Dewey-Mattia is the director of the Port Authority of New York and New Jersey's Office of Continuous Improvement, a team that applies lean and design thinking to transform processes to meet internal and external customer needs.

In her twelve plus years with the agency, she has also managed efforts across multiple disciplines – from implementing new technology for the PATH train system to logistics planning for the World Trade Center redevelopment.

Lisa has a Bachelor's degree from Brown University and a Master's degree in Urban Planning from Rutgers University's Bloustein School. She holds a professional license from the American Institute of Certified Planners.

B2: Playing Catchball at the Local Health System Level

Bridget Miller, Sr Director of Strategic Planning & Operational Development, LincolnHealth
Kelsey Robinson, Strategy Alignment & Operational Excellence Manager, LincolnHealth

Operational Excellence (OpEx) is a more than a tool for manufacturing – it's a methodology used within healthcare to optimize work across systems. OpEx has been used at MaineHealth since 2013 and at LincolnHealth, a local health system, since 2015. Through utilization of balanced scorecards at the system, local and department level, we engage our care team members in creating a culture of continuous improvement, eliminating non-value added activities, reduce process variation, and acute attention change and transformation. Our mission for process improvement at LincolnHealth is to foster quality and value in our healthcare system with alignment of purpose using strategic priorities, innovative solutions, Plan-Do-Study-Act, and data informed decision-making in striving for excellence for our patients, our staff, and the community. The learning session will dive into how LincolnHealth engages in strategy alignment and lean daily management efforts to advance the quality of care we provide. The session will break down the fundamental tools used to achieve balanced scorecard metrics – such as the daily operational huddle, data-driven decision-making, Gemba walks, and improvement boards.

Results: Participants will leave the session with an overall understanding how to leverage the strengths and talents of all organizational team members to reach goals.

Bridget Miller

Senior Director of Strategic Planning and Operational Development, LincolnHealth



Bridget has a B.S. in Behavioral Science from the US Air Force Academy, an M.A. in Social Psychology from Regis University and a Certified Lean Six Sigma Black Belt and Problem Solving Decision Program Leader.

Bridget has worked in a variety of industries including the military, education, consulting, and manufacturing.

Kelsey Robinson

Strategy Alignment & Operational Excellence Manager, LincolnHealth



Kelsey has been with the organization since May 2023 and is excited to be diving into process improvement work.

Prior to MainHealth, she was the Director of Healthy Lincoln County, a community-based health organization where she led a team focused on nutrition education, education, food insecurity, and substance use prevention.

Kelsey holds a B.S. in Medical Biology and a Masters of Public Health. She looks to utilize her deep understanding of the culture and harness deep connections within the care team at LoncolnHealth as a means to drive change.

B3: Veterans Health Administration: Creating an Annual Diagnostic Assessment Tool

Lisa Doyon Davis, Deputy Director, VHA National Improvement Office

Herbert :Steve” Hogue, Administrative Consultant, VHA National Improvement Office

Melinda Davis, Clinical Consultant, VHA National Improvement Office

Jacob Lough, Health System Specialist, VHA National Improvement Office

The Veterans Health Administration (VHA) Systems Redesign and Improvement (SR&I) was utilizing manual compliance and diagnostic assessments for soliciting compliance and maturity level data for VA Medical Center (VAMC) Lean Improvement programs. Only 28 of 179 VAMC's were completing the assessment annually. SR&I identified current and target states and determined potential root causes using a fishbone diagram.

Current state metrics were obtained via automated survey. Responses were validated with supporting documentation to indicate compliance. Analysis was performed using Microsoft Power Business Intelligence (BI). The four key domains analyzed included Lean training/certification, project work, leadership involvement, and program management, plus compliance with the VHA Lean Program Directive.

National SR&I added a dashboard to analyze results of the assessment, highlighting opportunities for program maturation, benchmarking, and sharing of strong practices. Identified gaps in Lean maturity across VHA were prioritized to develop targeted enterprise-wide strategic plans.

We will incorporate graphical displays of baseline information and discuss aggregated information obtained from the platform, describe system characteristics, and visual information for the BI dashboard used for comparison and analysis. Finally, we will describe plans for sustainment of the annual assessment, lessons learned and potential uses.

Results:

- Participants will be able to describe and visualize the impact and value of an online standardized diagnostic assessment tool for evaluating improvement programs
- Participants will learn about criteria used for identifying strong practices
- Participants will be able to describe the impact of highlighting successes to leaders
- Participants will understand the importance of knowing if a process improvement program meets the rigors needed to drive strategic objectives and support the organization's mission.

Melinda Davis

Clinical Consultant , VHA National Improvement Office



Melinda Davis is a Clinical Consultant with the Veterans Health Administration Office of systems Redesign and Improvement within the National Improvement Office.

She has been a member of the National Association for Healthcare Quality (NAHQ) since 2011 and is a published chapter author for Introduction to Quality and Safety Education for Nurses. Her clinical background is critical care nursing.

She is an active member of the Clinical Nurse Leaders Association (CNLA) where she has served as a CNL Ambassador and national Certification Exam Writer.

She is a VHA certified Lean Green Belt, working toward her Lean Black Belt, and is a certified ISO 9001:2015 Auditor.

Davis earned her graduate degree at Vanderbilt University School of Nursing and a BSN in Biology and Chemistry at Freed-Hardemen University.

Herbert "Steve" Hogue

Administrative Consultant, VHA National Improvement Office



Steve is an Administrative Consultant with the Veterans Health Administration (VHA) Office of Systems Redesign and Improvement (SR&I).

He served in the US Air Force for 30 years, most of it as a Logistics and Data Systems Analyst. Following the Air Force. He was the Data Quality Officer for the Landstuhl Regional Medical Center (with 8 clinics spread across Europe), Landstuhl, Germany for 10 years.

His service with the VHA since 2013 includes implementing Quality Management Systems (QMS) and consulting on VA-wide SR&I program initiatives.

He earned a Masters of Science in Management Information Systems from Bowie State University, Maryland. He is also a Lean Six Sigma Master Black Belt and certified ISO 9001:2015 Auditor.

Jacob Lough

Health System Specialist, VHA National Improvement Office



Jacob Lough is a Health System Specialist with the Veterans Health Administration (VHA) Office of Systems Redesign and Improvement within the National Improvement Office.

He has 10 years of clinical experience as a Registered Respiratory Therapist and has served as the Systems Redesign Coordinator both at the facility and regional level for the VHA.

He is a Lean Black Belt certified and a VHA Master Transformational Coach, as well as a certified Improvement Advisor.

Lisa Doyon Davis

Deputy Director, VHA National Improvement Office



Ms. Doyon is the interim Deputy Director of the Veterans Health Administration Office of Systems Redesign and Improvement within the National Improvement Office.

With more than 25 years of experience in government healthcare, she is skilled in healthcare consulting, performance improvement, healthcare data analytics, project management, accreditation, strategic planning, and policy writing.

Lisa started her VA career in 1995 on an inpatient acute care unit at VA Maine, and subsequently worked in inpatient, outpatient, long-term care, and administrative settings.

She has developed curriculum, taught Lean and Lean Six Sigma, and coached individuals and teams at Facility, Regional and National levels. Lisa led the development of the first regionally based VHA Innovation to Impact Center, the VA New England Center for Innovation Excellence, with a focus on collaboration between Innovation and Improvement to bring the best and most innovative outcomes to Veterans.

B4: Personal Kaizen: Applying Lean for individual continuous improvement

Steve Musica, President, Lean East

This session will explore simple ways to apply the core principles of Lean for personal continuous improvement. Participants will learn and discuss improvement concepts and rules for living an effective life.

We will also explore basic methods for personal change, with participants encouraged to share their personal experience with improvement habits and "life hacks."

This fun and highly interactive session will be participant driven, with discussions on a number of topics and concepts and lessons. We expect each participant will leave with at least one improvement action they can utilize to improve both their personal and professional lives.

Steven A. Musica

President, Lean East



Steve Musica is the President of Lean East and consults on improvement efforts that improve customer value while reducing costs. Steve and the Lean East team have helped many organizations utilize simple Lean tools to scale and grow their companies, focusing on achieving measurable results.

Steve has engineering and management degrees with over twenty years of experience training operational best practices and instituting continuous improvement cultures that increase customer satisfaction and profitability. He has previous management and operational experience as President, CEO, COO, and VP of Operations for medical and technology companies.

He is a certified Lean Six Sigma Black Belt with extensive experience in Toyota Production System (TPS) methods. Steve earned a Bachelor of Science degree in Mechanical Engineering from the University of Maine with high distinction and high honors and a Master in Engineering Management (MEM) degree from Dartmouth College.

Lean East facilitates transformations in service and healthcare organizations to improve outcomes while reducing costs. He and the team learned continuous improvement methods from some of the best organizations in the world and have led multiple successful transformations.

B5: Why Lean Works: The Solution to Human Nature: Business Mismatch

Gavin Watson, Board Chair, Connecticut Chapter of Conscious Capitalism

Many programs are about tools or frameworks or systems such as Lean. This session is about why those systems work. In this session, I will present the new, revolutionary concepts in evolutionary biology and psychology that will transform your understanding of human groups.

For humans it is not about survival of the fittest, it is about survival of the fittest group. Groups with minimal hierarchy, maximum autonomy, a strong sense of belonging, competence, adaptability and shared purpose will outperform the competition. Our ancestors figured this out 200,000 years ago and it is still the best system. Lean, Agile and other systems work so well because they emulate the human group systems baked into us by our evolution. Seeing our human system clearly enables you to more easily engender high performance cultural systems within your group.

Results:

Attendees will come away with a new perspective on human groups and how to optimize their groups for both human fulfillment and performance. This will result in dramatic improvement in people engagement, retention and growth.

Gavin Watson

Board Chair, Connecticut Chapter of Conscious Capitalism



In the family food manufacturing business, Watson, Inc., Gavin moved up from maintenance to engineering and eventually vice president of operations, spearheading employee engagement.

As a food manufacturer, Gavin emancipated teams to design and run continuous improvement based on Lean and Agile processes, self-organizing self-directed teams, and open space meetings for all levels of the organization. In 2019, his family company sold for \$80 million. He is now on the board of several organizations, where he focuses on continuous improvement culture and leadership development.

Along with several other members of the Connecticut Chapter of Conscious Capitalism, Gavin helped design a Conscious Leadership Network program for business, non-profit, and business education professionals interested in co-learning about Conscious Business.

Gavin's book, Altruistic Business, Why Conscious Business Outperform the Competition, was released on January 25, 2023.

Gavin attended Fairfield University and has a BA in religious studies and a minor in psychology.

2:00 PM – 3:00 PM

C1: MaineGeneral Health - Building a Culture of Excellence Through Continuous Improvement

Patty Morini, Process Design Manager, MaineGeneral Health

Aaron Sienkiewicz, Process Design Manager, MainGeneral Health

Courtney Renfro-Covert, Process Deign Manager, MaineGeneral Health

Stacey Russell, Revenue Manager, MainGeneral Health

In this session, members of MaineGeneral Health will provide a brief overview of the Lean training system that has been developed at MaineGeneral and show how this training is used through several case studies.

Participants will gain insight into how a small Lean Team (3 full time employees) can have a large

impact on the culture of an organization. They will learn how empowering every employee to be a problem solver leads to innovation outcomes and a culture of continuous improvement.

Results:

Participants will understand how developing a version of a lean "belt" system can work as we build toward a lean management system.

Patty Morini

Process Design Manager, MaineGeneral Health



Patty Morini has her Master's Degree in Art Therapy and worked as a therapist for 23 years.

She took a flying leap into the Process Design team after engaging in a grant to improve access and retention in Substance Use treatment using PDCA. This woke up her dormant math brain and spawned interest in continuous improvement.

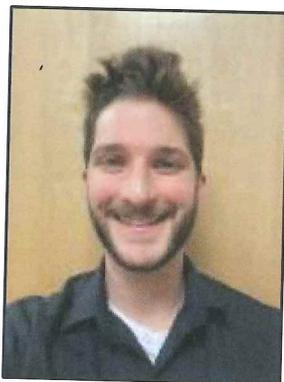
She obtained her Black Belt in Lean Six Sigma with her amazing lean team colleagues and works projects throughout the MaineGeneral Health

System.

She is SO happy to have hung up her diagnostic hat to work with all employees in developing the psychological safety that promotes engagement in continuous problem solving at MaineGeneral.

Aaron Sienkiewicz

Process Design Consultant, MaineGeneral Health



Aaron was born and raised in central Maine. He attended the University of Maine in their Chemical Engineering program.

After graduation, he joined the paper industry and was introduced to Lean Manufacturing where he trained and obtained his Black Belt.

Looking for a change in scenery, Aaron found his way to the Healthcare system and onto the greatest Lean Team he could ask for.

Currently, Aaron leads Lean projects, teaches Lean Belt and loves to sit down with a cup of coffee and help make the daunting worlds of data more accessible to everyone at MaineGeneral.

Courtney Renfro-Covert

Process Design Consultant, MaineGeneral Health



Courtney Renfro has a B.A. in Mathematics and B.S. in Nursing. She began her Nursing career in critical care but left the bedside for a job in healthcare quality where her continuous process improvement journey began.

She became a Certified Professional in Healthcare Quality (CPHQ) in 2016 and a Six Sigma Black Belt in 2021.

Courtney enjoys teaching others how to identify and eliminate waste within processes in order to better serve their customers. Outside of the classroom, she is a Lean coach, facilitator and project manager.

Stacey Russell

Revenue Cycle Manager, MaineGeneral Health



Stacey started working for MaineGeneral as a billing representative, and quickly fell in love with the complexity of the Revenue Cycle. This sparked a curiosity to know how and why we did each step, as well as how to remove barriers.

When MaineGeneral started offering Lean Six Sigma classes, Stacey jumped at the opportunity to get her Green Belt. Stacey always enjoys being able to jump in with the process design team and engage teams across the organization as they solve problems.

C2: Policy Deployment – Aligning Your Organization

Bob Elliott, CI Manager, Greater Boston Manufacturing Partnership (GBMP)

This session will provide a step by step method for creating policy deployment using the x-type matrix and related practices. The X-type matrix also identifies the means by which priorities will be achieved, and provides a measurement component that allows on-going tracking of priorities against predetermined targets. Session time is divided between lecture and classroom examples and workplace practice. Attendees will learn how to :

- Establish a theme for improvement that will unite and motivate the entire workforce.
- Define three to five year goals to provide pace and direction and boundaries to the improvement process
- Evaluate and prioritize best short-term (12 month) projects that support strategic objectives and can be achieved with available resources
- Identify accountability for key projects
- Effectively measure project status
- Translate improvement results into bottom-line cost savings

Results:

Attendees will understand the importance of alignment within an organization. They will understand management's role in organizational alignment. They will have a tool, the X-Matrix to

use to develop their long-term plan and setup a one tactical plan with measures, targets and teams.

Bob Elliott

CI Manager, GBMP



Bob Elliott is a Continuous Improvement Manager at GBMP and a Certified Shingo Institute Workshop Facilitator.

Bob has facilitated training and implementation of Lean Principles in many World-Class organizations including Raytheon, Drager Medical, Flexcon Industries, Mersen, and Norfolk Southern Railroad to name a few.

Bob's training and coaching abilities are not limited to manufacturing; he has worked with many Healthcare organizations including Concord Hospital, Lowell General Hospital, Mass General, Emerson Hospital, and Somerville Hospital.

Bob has held top-level Operations Management positions at several local Massachusetts companies. Bob holds a BS in Operations Management from Northeastern University.

C3: Building To CI Maturity – A Program's Journey

Megan Maxwell, Program Manager, Port Authority of NY & NJ

Lisa Dewey-Mattia, Director, Office of Continuous Improvement, Port Authority NY & NJ

During this session, we will briefly share about the Port Authority's Continuous Improvement (CI) program with a focus on the program's evolution, referencing CI maturity models. At the Port Authority, a small centralized CI team collaborates with staff and leaders throughout the organization to identify key customer challenges, conduct Voice of Customer assessments, map and dissect processes and issues, and eventually solve for root causes to achieve impact and enable efficiencies.

Some recent highlights include:

- A cross-functional effort that addressed pain points the MWSBE firms have with our organization, including eliminating 1,200+ backlog of MWSBE certification applications, enabling firms to become certified and eligible for Port Authority contracting opportunities
- Driving culture and supporting staff in developing new approaches for emerging challenges, including how to empower frontline workers in the development of technology solutions

In addition to achieving specific impacts and improvements, the Port Authority CI program builds staff continuous improvement capacity to support culture transformation – a culture that emphasizes bias toward action, collaboration, customer-centered mindset and creative problem solving. In 2022, 625+ employees were involved in a continuous improvement training, forum, or project; 30+ departments were involved in a CI effort, and 250+ employees participated in a 1+ process improvement effort. We'll share lessons learned – failures and successes – with the hope

that our learnings can be applied to peer organizations' efforts.

Results:

Participants will gain lessons learned and tips we've learned along the way, specifically how to build and leverage strong sponsorship, how to effectively scope new projects, and how to structure an effort to enable continued evolution and growth.

Megan Maxwell

Program Manager, Port Authority of NY & NJ



Megan is currently a Program Manager in the Office of Continuous Improvement (OCI) at the Port Authority of New York and New Jersey.

Her work focuses on collaborating with departments on process improvements, customer experience initiatives, and strategic alignment, with a focus on using design thinking and lean tools.

While in OCI, Megan has facilitated CI efforts that have identified improvements in both back-office processes such as contract authorizations and journeys for the travelling public such as social distancing interventions.

For the past two years, she has focused her facilitation support towards improving the experience of minority and women-owned businesses that seek to do business to the agency. In addition to supporting CI efforts, Megan focuses on developing capacity building programs to increase the use of CI tools and concepts in everyday work. Engagement with CI training has doubled since 2019.

Megan has also worked in Security Performance, Policy, Planning, Enterprise Risk Management, and Aviation at the agency.

Prior to joining the Port Authority, Megan worked in non-profit arts organizations. She has a Bachelor of Arts in Political Science and International Relations and a Master of Public Administration from the University of Southern California and a Juris Doctor from Santa Clara University.

Lisa Dewey-Mattia

Director, Office of Continuous Improvement, Port Authority NY & NJ



Lisa Dewey-Mattia is the Director of the Port Authority of New York and New Jersey's Office of Continuous Improvement, a team that applies lean and design thinking to transform processes to meet internal and external customer needs.

In her twelve plus years with the agency, she has also managed efforts across multiple disciplines – from implementing new technology for the PATH train system to logistics planning for the World Trade Center redevelopment.

Lisa has a Bachelor's degree from Brown University and a Master's degree in

Urban Planning from Rutgers University's Bloustein School. She holds a professional license from the American Institute of Certified Planners.

C4: Blue Q Goes "Ohno" Expanding the Future Through Lean and Innovation

Fred Shamburg, President, Leanovations, LLC

Sergio Bencivenga, Warehouse Manager, Co-Lean Leader, Blue Q

Bill Wright, Operations Leader, Co-Leader, Blue Q

Invest 60 minutes to experience the Blue Q culture of enthusiasm, engagement, and empowerment from employees – not the owners, about the amazing Lean journey now 8 years and going strong. Strategically organizations must implement both Lean and Innovation to compete in today's challenging market. The attendees of this session will learn about Blue Q's Lean and Innovative success through funny and humbling stories, examples of team events, and unimaginable business results and employees who enjoy profit sharing and being part of the Blue Q family, all accomplished by adopting/applying these Ohno principles:

- Leaders must Lead
 - Lean starts at the top
 - Leadership living the Lean culture must be developed at all levels
 - Long-term success depends on continuity of leadership
- People Must be Taught and Supported
 - Learning by doing through Kaizen events is more powerful than learning by listening
 - People need daily support to help cope with the uncertainty of change
 - People need a future vision
- Change Needs a Plan and a Process
 - Attitude and behavior change must be supported by structural change
 - Key Performance Indicators do not produce change, but are enablers of change
 - A Lean Transformation journey takes many small continuous improvement steps
- Lean Transformation Requires
 - Consistent and committed Leadership
 - No Arrogance or people who think they have all the answers
 - Everyone to trust the journey and stay the course as there will be ups and downs
 - Using the Plan-Do-Check-Act process of Learning is key to success

Results:

Participants will understand how important it is for leaders to lead by example, provide a supportive environment to take a risk, to celebrate the wins/results with all stakeholders and to make the journey fun for all. Blue Q will share how all stakeholders have enjoyed the growth, from the employees, the community, national environmental and health organizations, the customer, and over 60 manufacturing organizations who have toured Blue Q to hear and learn about their Lean journey.

Fred Shamburg

President, Leanovations



Fred was introduced to lean by one of the originators of the “Toyota Production System” and very quickly developed a passion for teaching and applying lean principles to the total business enterprise.

He has over 30 years’ experience in leadership and executive level positions for multinational corporations, as well as experience working with organizations in diverse industries that include aerospace, medical, automotive, chemicals, government, and service organizations.

The Board of Examiners for the National Shingo Prize selected Fred as a Shingo Prize Examiner in 2007. A frequent speaker at business conferences, Fred has taught Lean worldwide and in all regions of the US, with experience in over 20 countries and 30 states. He is recognized as an international leader in successfully implementing Lean and Innovations where Lean plus Innovation equals Leanovations.

Sergio Bencivenga

Warehouse Manager, Co-Leader, Blue Q



Sergio began his career as a purchasing assistant with Blue Q over 20 years ago. In 2009, he became the Purchasing Manager and then became the Warehouse Manager for Blue Q in 2013 leading a staff of 12.

As the Warehouse Manager, in 2013, Sergio was introduced to Lean while touring a display manufacturer that was working with Leanovations. Realizing the potential of Lean and the amazing process of teamwork, he sold the Blue Q owners to bring Leanovations and LEAN to Blue Q, having their first Lean Team Event in 2014 on the warehouse picking line.

The first Lean event immediately improved efficiency by 30% and helped to cement Leanovations process into the culture of Blue Q. Applying and sustaining Lean and Innovations and conducting multiple Kaizen Team events, Blue Q has averaged over 20% in increased sales/year over the last 9 years while growing employment in the warehouse by 233%.

Bill Wright

Operations Leader, Co-Lean Leader, Blue Q



Bill started his career at Blue Q over 14 years ago in Operations. Bill has been involved in various opportunities at Blue Q, including customer service, photography, marketing and now as an Operations Leader.

Bill was the first Team Leader of Leanovations event in 2014, and he developed a craving for Lean and a culture of Teamwork.

Since that first event, Bill has led the way at Blue Q, always leading by example and looking to implement processes to enhance work flow and improve the overall efficiency of the company and to meet the ever-increasing customer orders.

C5: Situational Leadership – When to Lead and When to Manage

Robert Burke, Managing Partner and COO, Value Innovation Partners, Ltd

Situational Leadership is when the leader or manager of an organization must adjust their style to fit the development level of employees or team member they are trying to develop and/or influence. It is up to the leader to change their style, not the follower to adapt to the leader's style. Leadership style may change continually to meet the needs of others in the organization based on the situation.

In this session, you will learn about the 4 Leadership Styles:

- The Situational Leadership Matrix
- How to determine the style of leadership to use for a specific person(s) in a specific task
- The components of Readiness and Relationship to leadership
- The 20 Keys of Leadership

You will also learn how to create a culture of empowerment and accountability

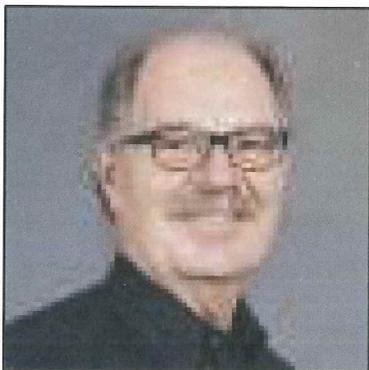
- Understand what is and isn't empowerment and accountability
- How to create a culture of empowerment, its element, and what is needed for it to work
- What an empowering organization is
- The Freedom Scale and how it relates to situational leadership
- The relationship of Empowerment and Accountability

Results: Attendees will take away the 4 behavior styles they can use in their own organization

- S1 – Telling
- S2 – Selling
- S3 – Participating
- S4 – Delegating

Robert Burke

Managing Partner, COO, Value Innovation Partners (VIPGroup)



Robert Burke is a Managing Partner/COO for VIPGroup

He has held positions ranging from Materials Director, Production Planning, Inventory Manager, Procurement, and Machinist. Bob provides training and implementation methods in areas of Lean Manufacturing, Pharmacovigilance, Supply Chain Management, Kaizen, Vendor Managed Inventory, Logistics Planning, Leadership, and Supplier Certification.

. Bob has a B.S. in Business Administration, is a certified Six Sigma Black Belt, Lean Sensei, CPIM from Association of Supply Chain Management, formerly APICS and a ISO Assessor.

Bob has co-authored dozens of articles on the subject of Lean operations. He has presented this session at both national and international conferences for IIE, AME, APICS, ASQ, NAM and to companies such as Pfizer, Bayer, Johnson & Johnson, Avery Dennison, and ICI-Dulux. He is a member of AME, IIE, ASQ and ASCM.

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