

Town of Falmouth Consultant Services RFQ**Introduction:**

This statement of qualifications from Lean East to the Town of Falmouth is based upon an emailed RFQ from the Town for Consultant Services to Conduct a Public Process to Develop a Town Vision and Values Statement.

Statement of project understanding:

Lean East read the RFQ as requesting help with creating a vision and values statement in a public process. We see that as primarily a political event that will involve facilitating a number of sessions and recording comments from the public before combining the comments. The resulting work will be long-range and visionary and will make some people happy and others angry. It will likely not contain much that is actionable and measurable. We have been involved with committees like this at the State level, and too much of the work is wasted and/or ignored once the council members change.

There are many consultants who can help with the above process. Lean East is not interested in, or any better than others, at this kind of work.

Our team has had the opportunity to interview several Falmouth leaders and community members and learned that an operational improvement need exists.

If the Town of Falmouth wants to take a real look at the current problems and issues, current and past data (including what went well and what didn't with implementing the 2013 plan), evaluate current strengths, weaknesses, opportunities and threats, and then (when problems are understood) use the info to make improvements that can be measured and people held accountable to . . . this work is what the Lean East team is very skilled and experienced at.

Consultant's proposed scope of work:

The Lean East team would be interested in a modified Phase I project (or consideration for this work in Phase II) only if the Town of Falmouth wishes to improve the operations of the town and interactions between the Council, Staff, and Community. Our skill and experience is in partnering with key leaders to review the current processes and data, discover root cause issues, and help Town leadership create and implement an improvement plan. Please review our proven process below.

A typical Lean East improvement process follows a Plan-Do-Check-Act (PDCA) process with the planning phase broken into sections that leads the team through a proper assessment and problem solving process. Lean East then utilizes simple, proven Lean Six Sigma and project management tools to implement actions and measure the

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improvements. We ensure multiple project improvements are achieved and action plans are in place for additional improvements prior to celebrating success. At the conclusion of the project we help the team standardize the process to sustain the improvements. The goal is for every improvement team member to participate in the process and experience a successful project.

The Lean East experts will train and coach the team so they learn and develop new skills. Each step of the improvement process seeks to answer the key questions identified in the table that follows:

The  Lean East™ Improvement Process Steps

<p><u>Background</u></p> <ul style="list-style-type: none"> • Why is this project important? • Why should anyone care about this project and be motivated to participate in improving?
<p><u>Current Condition</u></p> <ul style="list-style-type: none"> • How do things work today? • What is the problem? Be sure to provide baseline metrics. • What is or is not happening?
<p><u>Goal / Target Condition</u></p> <ul style="list-style-type: none"> • What outcomes are expected for what reasons? • What changes in metrics can be plausibly expected?
<p><u>Root Cause Analysis</u></p> <ul style="list-style-type: none"> • What is the root cause(s) of the problem? • Use a simple problem analysis tool to show cause-and-effect relationships.
<p><u>Countermeasures (Experiments)</u></p> <ul style="list-style-type: none"> • Proposed countermeasures (quick experiments) to address each candidate root cause. • Predicted results for each countermeasure.
<p><u>Target State (Vision)</u></p> <ul style="list-style-type: none"> • A diagram of the future state that illustrates how the new proposed process will work. • Note specific countermeasures and expected improvement.
<p><u>Confirmation (Results)</u></p> <ul style="list-style-type: none"> • Actual result of each countermeasure (experiment). • How does the system actually behave with the proposed countermeasures in place?
<p><u>Follow-up (Actions)</u></p> <ul style="list-style-type: none"> • What have we learned that does or does not improve the situation? • In the light of the learning, what should be done? • How should the way we work or our standards be adjusted to reflect what we learned? • What do we need to learn next?

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Each of the steps above is a specific focus for the project, with the timing varying based upon the time available for project work by the team and the flexibility of the Lean East project facilitators. Lean East will work with Town of Falmouth leadership to create a project schedule that will allow for quick results while also allowing the Falmouth Council and staff time to complete most of their regular work responsibilities during the project.

Lean East has successfully facilitated many improvement projects for community non-profits, the Office of MaineCare Services and several other Maine State agencies, Maine Hospitals, multiple small businesses, and other organizations that deliver services.

Please learn more about the Lean East philosophy, recent projects, references and team members in the sections that follow. Lean East is invested in the long-term success of our clients and stands behind our work.

Background: Lean improvement principles are currently being used worldwide to improve quality and adaptability, improve delivery and turn-around times, and reduce costs and waste. Lean is *not* about layoffs or running the organization on a shoestring. Lean is a management *strategy* that focuses on continually improving the processes that deliver *value* to the customer by identifying and eliminating waste.

A Lean culture differs from a traditional culture in many ways:

Traditional Culture	Lean Culture
Function Silos	Interdisciplinary teams
Managers direct	Managers teach/enable
Benchmark to justify not improving: “just as good”	Seek the ultimate performance, the absence of waste
Blame people	Root cause analysis
Rewards: individual	Rewards: group sharing
Supplier is enemy	Supplier is ally
Guard information	Share information
Volume lowers cost	Removing waste lowers cost
Internal focus	Customer focus
Expert driven	Process driven

Source: A.P. Byrne, O.J. Fiume

Lean East is a Maine-based organization consisting of experienced leaders and Lean experts offering strategic consulting, training and coaching to help organizations implement Lean improvements that improve customer outcomes and reduce costs. We have trained and coached many senior leaders and employees in healthcare to help them learn how to apply performance improvement methodologies and improve processes. Our improvement

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projects typically have a high return on investment for the organization and provide increased value to customers and staff by reducing overburden, inconsistency and operational wastes. We focus on achieving measurable results.

Goals of Lean East include:

- Maximize value to the customer by maximizing the value of staff
- Teach continuous improvement tools and coach staff to apply them during team-based operational improvement projects for the organization
- Establish new habits leading to each and every team member looking for ways to improve the value they add to their customers

Recent Lean East Projects:

- Sales and production process improvements and improved metrics for a \$5-10 million building construction contractor seeking to grow and expand the business
- Project management process improvement support for a health insurance provider to improve project outcomes with an estimate \$30 million in benefits to the company
- Improvement support projects as part of a larger “Good to Great” initiative at a 250-employee construction company
- Multi-year, Lean transformation strategy and implementation for State DHHS Office, with Lean Six Sigma project support resulting in multiple quality and cost improvements
- Quality improvement training and coaching for state public health department project teams to support statewide health improvement plan (six-month contract with renewal)
- Hospital surgical services performance improvement through waste reduction and workflow balance saving an estimated \$750,000 in the first two years
- Developed concept of operations for aligning Lean Six Sigma efforts between NAVSEA Headquarters, Supervisor of Shipbuilding and private shipbuilders
- Reduction in transcription service costs with annual savings of over \$200,000
- Hospital supply chain improvements: general surgery and pharmacy material stocking and replenishment processes to reduce labor and material wastes
- Courier services project with quality improvements and 45% cost savings
- Laboratory process improvements to improve quality and reduce wastes and costs
- Process improvement for state Medicaid provider achieving a 35% increase in access
- Providing Lean Six Sigma Training and trade training curriculum development for multiple organizations

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- Ocean sciences research institute proposal process improvement project with a 60% increase in the award rate
- Introduced Lean to medical device manufacturer for +70% revenue with <10% staff increase, quality +33% in first year, on-time delivery from 70% to 95%, lead time halved

Lean East References for the RFQ:**Doug Smith**

Formerly Chief Operating Officer (now Director of Molina State of Maine
DHHS, Office of MaineCare Services
242 State Street, Augusta, ME 04333
Phone: 803-237-4611 Email: douglas.smith1@molinahealthcare.com

Project Summary: Lean organizational excellence transformation support including organizational assessment, strategic planning, training, coaching, project facilitation, and leadership development services. Supported multiple Lean improvement projects and assisted over 20 separate teams in the organization identify balanced metrics and set improvement objectives.

Project Timeline: 9/2016 to 3/2018

Client Testimonial: “We chose the lean six sigma experts at Lean East (LE) to engage our employees in improving the operational processes that support our MaineCare providers and members, resulting in more streamlined and efficient work processes. LE also provided a lean approach to helping us implement our strategic plan for organizational excellence, focusing on creating a more satisfied and effective workforce. Our team was excited to take a new approach that will help improve the way they work and manage employees. We also leveraged Steve and team to develop strong Key Performance Indicators to measure, monitor, and manage our performance in various business areas. These indicators will help us focus on delivering more value to Maine.”

Lois Skillings

President and CEO
Mid Coast – Parkview Health
121 Medical Center Drive, Brunswick, ME 04011
Phone: 207-373-6027 Email: lskillings@midcoasthealth.com

Project Summary: Multiple consulting services and healthcare improvement projects over nearly a two-year period, including training the leadership team on best practices for healthcare improvement using a train-the-trainer approach; project management and coaching on applying improvement tools; and Lean and Toyota Production System training for the MCHS management team (approximately 40 managers).

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Client Testimonial: “Steve is a teacher and coach that uses a proven process for his projects and stresses that good things will happen when you put the patient first. We have asked Steve to support our performance improvement efforts and Triple Aim initiatives in the coming months. I highly recommend Lean East and Steve for healthcare improvement.”

Peter Horch, Owner and President

Ceramco, 2414 Camden Rd, Warren, ME 04864

Phone: (207) 273-1111

Email: peter@horchroofing.com

Project Summary: Lean East is supporting process improvements with the Horch Roofing team in multiple areas as the small business grows and expands in Maine. The estimating process has been streamlined and is being standardized to improve customer service and outcomes. The repair process has been improved by the team for faster response times and a simpler invoicing method. The Horch Roofing leadership team has established a dashboard of metrics that will help the business continue to improve in the areas of safety, quality, customer service, and cost. Initial results for the team have been very promising.

Project Timeline: 10/2018 to Present

Client Testimonial: “Lean East opened my eyes to a process-driven lean six sigma methodology that has had immediate impacts on my business. One of the keys to success has been Steve's ability to work with my diverse team their many learning styles. He has effectively coached my office of executives, sales staff, and office personnel to think alike and understand their processes. I am convinced we will continue to be successful with the tools that Lean East has provided us. I confidently recommend Steve and the Lean East team for any service based/trades industry.”

William Kilbreth

Chief Information Officer

Community Health Options

240 Bates Street, PO Box 1121, Lewiston, ME 04240

Phone: 207-402-3354 Email: wkilbreth@healthoptions.org

Project Summary: Project management process improvement support for the Health Options Project Management Office (PMO). Lean East worked with the PMO team and executive management to support several key internal projects and implement an action plan to improve project outcomes for the company. Health Options estimates the improved process will result in a \$30 million benefit.

Project Timeline: 5/2018 to 10/2018

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Client Testimonial: “Lean East provided valuable guidance to our organization in making project management more successful. We’ve achieved tangible improvements in communication, prioritization, and project initiation due to the disciplined and thoughtful approach Steve modeled. Community Health Options operates in a competitive and regulatorily challenging environment and having the stronger project methods Lean East helped us develop will enable us to continue to succeed in this market.”

Biographies for Selected Lean East Team Members:

Steve Musica is a Founder and the President of Lean East. He consults on improvement efforts that improve customer value while reducing costs. Steve has previous management and operational experience as President, CEO, COO, and VP of Operations for medical and technology companies and led successful Lean transformations for both medical device and manufacturing companies before founding Lean East in 2010. Steve learned Lean with some of the best in the world and now uses his knowledge and experience to help others transform their organizations.

Steve has over sixteen years of experience training operational best practices and instituting continuous improvement cultures that increase customer satisfaction and profitability and is certified by Dartmouth College as a Lean Six Sigma Black Belt. He earned a Bachelor of Science degree in Mechanical Engineering from the University of Maine with high distinction and high honors and a Masters in Engineering Management (MEM) degree from Dartmouth College

Steve was previously VP and Director of Operations for medical device company FHC, Inc. where he was responsible for all aspects of operations internationally, including manufacturing, supply chain, quality control, customer service, information technology, and engineering. He led significant improvements in quality, delivery, and cost savings that resulted in documented efficiency gains allowing production teams to double their output with the same number of staff. Steve also has previous experience at Hypertherm, Inc. in operations management and manufacturing engineering, as well as International Paper in engineering, project management, and leadership positions. He has been an advisor or board member of several other organizations.

Steve has recently supported multiple projects at several Maine hospitals and Steve is currently leading a multi-year organizational transformation for the State of Maine Department of Health and Human Services Office of MaineCare Services. Steve has also supported a Maine based solar energy manufacturing company, insurance companies, healthcare practices, an aquaculture company, a medical device start-up, research

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institutions, etc. He is an active writer, speaker and trainer on the topics of Lean and continuous improvement.

Testimonials about Steve:

- "Steve has facilitated performance improvement teams for departments including Surgical Services, Diagnostic Imaging and the Pharmacy. He has helped us identify wastes and cut costs. He is a teacher and coach that uses a proven process for his projects and stresses that good things will happen when you put the patient first. We have asked Steve to support our performance improvement efforts and Triple Aim initiatives in the coming months. I highly recommend Lean East and Steve for healthcare improvement."
- "Steve can work equally well with top management and workers on the floor."
- "Steve has a good nose for opportunity, is execution focused, and strikes a good balance of thoroughness and moving quickly."
- "I have been here for two years but didn't know until now how this process works."
- "Thanks for all of your help and support. Your expertise and facilitation skills helped it happen!"
- "Steve assisted in the curriculum and certification testing for the Dartmouth Lean Six Sigma Program to get the program started."
- "Steve is known as a leader who will take the time to make sure that the right questions are asked, that problems are pursued to root cause, and that each individual on the team has the right training, tools, and information to be as productive as possible."

Michelle Wyman is a Senior Consultant with a mission to create learning opportunities that support and engage individuals in reaching their personal best (confident, competent and fulfilled) and organizations in continuously improving to achieve strategic objectives. Michelle has held leadership positions in energy, health care, and manufacturing industries where she has managed Organizational Development, Leadership Development, Team Development, Apprenticeship Programs, Technical Skills Training, and Human Resource functions. She has extensive experience with performance management, competency development and coaching.

Michelle is a Senior Professional in Human Resource with 30 years of Organizational Development, Training and Human Resource experience. She holds a Bachelor's Degree

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in Secondary Education and a Master's Degree in Adult Education and is certified in Coaching, Change Management, Six Sigma and as a Society of Human Resources Management – Senior Certified Professional. Michelle formerly served on the Board of Directors for Coastal Counties Workforce Development and on the Executive Board of Maine's Society for Healthcare Human Resource Administration where she received a Leadership Award for her Training and Development efforts.

Testimonials about Michelle:

- “Michelle brings a rare and valuable combination of skills, including big-picture thinking with operational experience and expertise. Her ability to quickly become a trusted partner is noteworthy, and her approach to people and projects is always in the spirit of conversation, curiosity and continuous process improvement.”
- “I worked with Michelle for years at a large engineering and manufacturing organization. She has best-in-class organizational development skills, and was consistently sought out for strategic, operational and cultural guidance. As a lifelong learner, Michelle is current with best practices from a human capital perspective, and is able to weave in the nuances of organizational behavior, team dynamics and adult education in all of her work.”
- “Michelle and I worked together to develop and implement a new online performance evaluation process for our salaried workforce. Michelle's expertise in performance management was essential to the successful implementation of the new process. Michelle led the development of training for 1,200+ employees prior to implementing the new system. I would not have been able to implement this project without her organization capabilities, facilitation skills, strategic thinking capabilities and her exceptional team work ethic.”

Availability for interview between February 3-7, 2020:

President Steve Musica is currently available for an in-person meeting on Tuesday the 4th and the afternoon of Friday the 7th. Please email to set up an interview time only if the Falmouth team wishes to move beyond the basic vision and values work and address current problems and issues to improve town operations.