FIRST Group Project Interim Report Guidelines:

Progress to date with photographs of process and storyboard

Due: (date)

Purpose: Encourage steady progress on the group project and provide opportunities for feedback from the instruction. The point is to coach and be sure you are thinking through the project carefully. Some of this will be rewriting what is on the project charter with a little more explanation.

What to Include:

1. **Background** on the organization.

2. **The Challenge**—what is it, where did it come from, and why is this the challenge?

3. **The Team, roles and responsibilities**—who are you working with onsite? (positions) Who is the learner at the client responsible for the project (position). Note: the learner will ideally be a manager or supervisor with direct responsibility for the project and should be responsible for the success of the improvements, continuing after the semester ends.

4. **Division of labor**—your team and the learner-team at the site.

5. **Initial understanding of the current state** (relevant charts, graphs, and observations which will vary by project). It is still early in the project so you may or may not have data to report, but at the least you should have some preliminary observations and define a preliminary plan for data you intend to collect, including process observation and performance outcome measures. Remember that we are all learning through the process, so anything you say in this report is subject to change as you experiment and learn more. Even in the PDCA cycle change metrics may change.

Use Photos to Illustrate:

--The Kata storyboard with at a minimum the process and challenge.
--Pictures of aspects of the process you are focusing on

* http://www-personal.umich.edu/~mrother/Handbook/Analysis.pdf

Looking Ahead: I would like a few of the groups who are relatively far along to volunteer to present your work in class on February 12. This is for the purpose of helping provide models we can all learn from.

SECOND Group Project Interim Report Guidelines:

Overview of challenge, current condition, obstacles, coaching and experimenting cycles with photos and initial results

Due: (date)

Purpose: Encourage steady progress on the group project and provide opportunities for feedback from the instructor. The point is to coach and be sure you are thinking through the project carefully. This should mainly be a brief review of the kata storyboard as if I was coaching you.

Format: paper as in interim report 1.

What to Include:

1. The Challenge—simply state it. It should be a catchy challenge statement (with some additional explanation) related to the process you are focus on. If you have a generic company wide challenge, such as doubling sales, you should have an intermediate challenge focused on the process you will be focusing on. In other words challenges can be nested.

Note that value stream mapping is a way to clarify the challenge in the future state.

2. The process you are focusing on—simple description. If this is a large value stream let me know what specific process you will focus on for this term.

3. What is your current condition? Use current condition analysis method as in the kata. This includes a block diagram, takt and PCT (if applicable), run chart (if applicable), work balance chart (if applicable), and summary of direct observations at the gemba. What are the current work patterns for the process you will focus on for this semester?

4. What is your next target condition (or the target conditions to date)? This should include both the desired outcomes and the process conditions. In two weeks we expect these results ____ and for the process to look like this _____.

5. What are the obstacles to the target condition and which are you focused on for each PDCA experiment? This should not be generic obstacles for the value stream, but rather obstacles to the target condition which can change if you get to a second and third target condition this term.

6. PDCA experiments—Describe any you have planned or ran, what you expected, and what you have learned from them and what you intend to do next (PDCA cycle record)

Use Photos to Illustrate:

--The Kata storyboard
--Blown up versions of sections like current state data that you want to use to explain the sections above.
--Any other graphs, diagrams and facts to clarify the current condition.

THIRD Group Project Interim Report Guidelines:
Progress to date with photographs storyboard

Due: (date)

Purpose: Encourage steady progress on the group project and provide opportunities for feedback from the instructor. The point is to coach and be sure you are thinking through the project carefully. This should mainly be a brief review of the kata storyboard as if I was coaching you.

Format: Continue with format used in interim report 2.

What to Include:

1. The Challenge—simply restate it.

2. The process you are focusing on—simple description.

3. What is your current condition? Provide some background on where you were starting from and then where you were at the start of the target condition you are now pursuing—this may be the same. Summarize each target condition you addressed and the PDCA cycles.   You do not need to restate all the details with all the statistics that you had in the second report. A bullet point summary is sufficient along with any new data you have collected since that report. If I commented on any deficiencies in the current state analysis, or any other point, address these.

4. What is your target condition you are focusing on now? (what number target condition)

5. What are the challenges to that target condition and which are you focusing on now?

6. PDCA experiments—Describe any you have planned or ran and what you have learned from them and what you intend to do next. Address for each experiment the four questions:
--What did we do?
--What did we expect?
--What happened?
--What did we learn?

Use Photos to Illustrate:

--The Kata storyboard
--Blown up versions of sections that you want to use to explain the sections above.

Group Project Final Report Guidelines

Final Class Presentation: (date)

Due: (date)

What to Include:

I.   Background on the organization.
II.   The Toyota Kata Project

    A. The Challenge—what is it, where did it come from, and why is this the challenge? (the challenge should ideally be broader then your specific project for the semester)

    B. The Team—who are you working with onsite? (positions) Who is the leader responsible for the project (position).

    C. Division of labor—your team and internal team.

    D. The current state (relevant charts, graphs, and observations which will vary by project). I am interested in all reports in going beyond outcome metrics to understand how people work. Here is the standard list:
--Task unit and how much time do we have to complete it? (takt, planned cycle time)
--Block diagram of process steps, layout of individual process if relevant
--Run chart—variation in the process
--Machine constraints if relevant—process capacity versus takt
--How many people necessary if the process is in a stable condition?
--How is the process performing? (output metric data)

    E. Summary of observations from the current state: What did you learn about work routines and potential issues that relate to the challenge?

    F. Target Conditions(first target condition and others if went beyond this)

    G. Obstacles to Target Condition (s)

    H. PDCA Cycles—Describe each one including answers to questions: Which obstacle? Action? Start and end date? Expected results? Actual Results? What did you learn?

    I. Overall Results –Compare starting point to ending point at semester end and any other results they are likely to achieve

J. Coaching Cycles—Describe coaching: When? Were the question cards followed? What was learned?

Use Photos to Illustrate:

--The Kata storyboard and anything else posted like a current condition summary poster.
--Picture of the team, ideally in a coaching session at storyboard
--Pictures of aspects of the process before and after PDCA cycles

III. Reflection on People Development and Improvement Process
   a. What did you learn from this project about developing your own improvement and coaching skills?
   b. What did you learn about Toyota Kata as an approach to building a culture of continuous improvement?
   c. What did you learn about change management?

IV. Culture and Leadership as they relate to continuing improvement
   a. Evaluate the culture of the organization (3 Schein levels)
   b. Analyze the leadership of the organization
   c. What are the supports and obstacles to continuing to develop a culture of continuous improvement (using kata) at the site?

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Presentation in Class:

- 10 minute summary
- Invite project site members and your coach (not necessary, but would be nice if they came)
- Typical presentation (10 slides or less; no need to go back over organization background)
  o Process focused on and challenge
  o Current State
  o Target Condition and Obstacles
  o PDCA Cycles
  o Results to Date
  o What did you Learn?