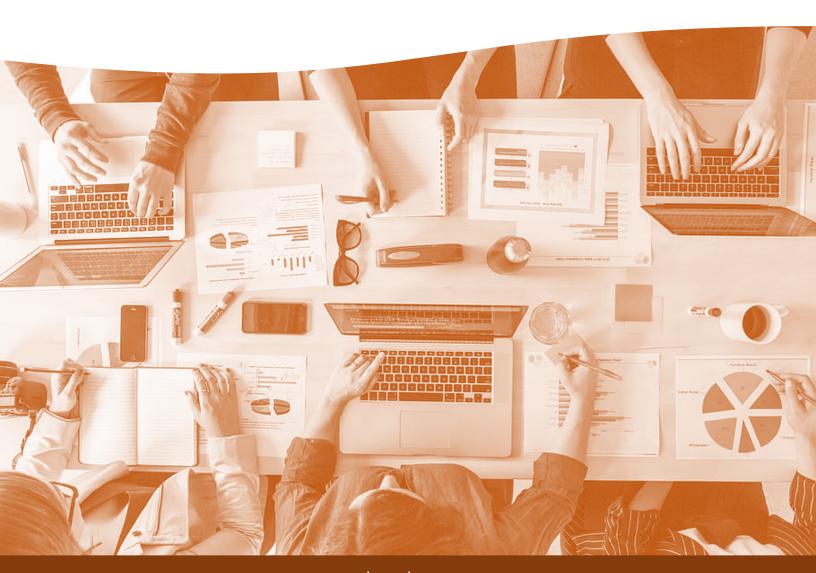
Tools that Drive Continuous Improvement

Matthew B. Courtney, Ed.D.







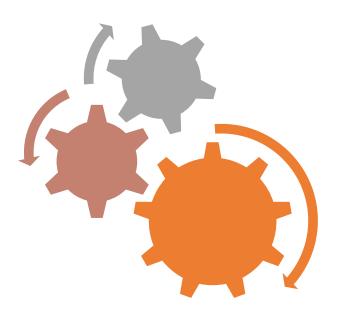
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Introduction

It can feel overwhelming when you have a big problem to tackle and no idea where to start. Believe me, I've been there. There are any number of gurus who will sell you "quick fixes" or condescendingly say that you simply need to improve core instruction and all of your problems will go away — as if its that easy. Sustainable school improvement requires careful planning and consistent evaluation. Without the tools to complete these two tasks, you will be working blind. You wouldn't wander into a dark forest without a map, you shouldn't wander into a continuous improvement meeting without one either.

In this eBook, I will provide an overview of ten of my favorite continuous improvement tools; five for planning and five for evaluating. These tools will help you get started as you begin to address systemic problems in your classroom, school, or district. Let's talk briefly about how you should use this resource.

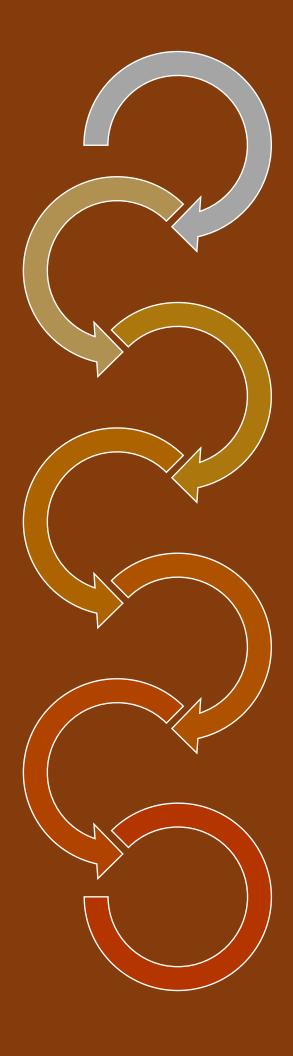
First, I want you to read the whole thing. That's right, cover-to-cover. The reason is simple. I am going to provide descriptions and templates for each of the ten tools. Each tool has its own purpose, methodology, and audience. If you simply flip through the pages and pick a template that looks familiar, you are likely to pick the wrong tool and miss a better opportunity.

Next, I want you to consider how you will both plan AND evaluate your continuous improvement tasks. You cannot effectively lead continuous improvement without both planning and evaluation. While each tool can be used in concert, they are going to work together in different ways. Consider your audience and desired outcomes and pick the planning and evaluation tools that meet your needs. You may decide later that you need a different tool, and that is okay too. I have even used four or five tools on the same project in order to plan for or evaluate different stages of implementation.

Finally, I want you to think about how these tools will work with your leadership team. Continuous improvement is not an isolated task. It requires a team of well-meaning collaborators who are on the same page. Consider the strengths and weaknesses of your team members and select a tool that plays to their strengths. Do you have a team that struggles to meet deadlines? A flexible tool like the Plan-Do-Study-Act method may be more appropriate than a rigid 30-60-90 day planning tool. Maybe your team is too big picture and needs help seeing the nitty-gritty. This team may benefit from a fishbone analysis over a Muri, Mura, Muda analysis.

One more tip before you go – when your team starts meeting, remember that transparency is key. Your continuous improvement team probably doesn't include all of the stakeholders in your system. That is okay – and often times appropriate. However; you shouldn't be secretive about your work. You should shout it from the rooftops! Everyone in your system needs to know the plan, understand their role in it, and be on the lookout for the expected outcomes. You should strive to build a culture where two-way communication is the norm and your continuous improvement efforts are served by a constant feedback loop.

I hope that the information in this eBook gets you thinking about how you can better plan and evaluate your continuous improvement tasks. Please feel free to copy and share the templates with your team and adapt them to meet your own needs. Good luck!



Part One Planning Tools

30-60-90 Day Planning

30-60-90 day planning is a planning method that breaks down big tasks into tiny pieces that can be easily completed. Ever heard the phrase *you eat an elephant one bite at a time*? Well, 30-60-90 day planning is how you eat an elephant!

Audience

30-60-90 day planning works great with small teams that are implementing big projects.

Life Cycle

The 30-60-90 day planning cycle takes a minimum of 90 days but can be extended in 30 day increments perpetually to meet your needs.

When to Use This Tool

Select the 30-60-90 day tool when you are launching a new project or working towards a medium-term goal. This is a good tool to help you break down big tasks into manageable pieces. It also helps keep big projects moving by building in monthly check points. Let's say that your team is designing a new Positive Behavior Intervention and Support (PBIS) system. A 30-60-90 day planning tool may be the right tool because it will allow you to break down the project into tangible pieces. You can easily document who is responsible for each part, when each part is due, and how you will know when the step is complete.

A word of warning – this tool isn't great for monitoring ongoing work. Once your big project or goal is achieved, consider switching to a Plan-Do-Study-Act cycle while you monitor the maintenance of your new system.

How to Use This Tool

To start, write down the name of your project on a white board or piece of chart paper. With your team, spend 15-30 minutes brainstorming the various components that need to be researched, developed, or built to complete your task. I like to use sticky notes for this task, because it allows me to move the parts around freely while brainstorming.

Once you have all of the pieces laid out, consider the sequence of events. What is the logical order to complete each of the tasks? Does each task need to be completed in succession or can two or more pieces be moving at the same time?

Finally, pull up the 30-60-90 day template and start filling it in. Document the tasks that can be completed within the first 30 days. Make sure to assign a point person to each task and define the product that each task will produce. Repeat this process for the 60 and 90 day benchmarks. If you need more time, you can keep going out in 30 day increments. I once wrote a phased policy roll out plan that was 18 months long!

Check in every 30 days as you work the plan. You will probably need to move stuff around or add new items that pop up while you're working. That is okay. Allow your plan to be a living document that reflects the work and passion of your team. When your project is complete, set aside some time to complete the reflection questions at the end of the template. Your answers to these questions will help you plan and implement future projects.

30-60-90 Day Planning Template

Project Overview		
Project Title:		
Project Start Date		
Project End Date		
Project Leader		
Team Members		
In 30 days we will		
Task	Point Person	Product
In 60 days we will		
Task	Point Person	Product

30-60-90 Day Planning Template

In 90 days we will		
Task	Point Person	Product
Project Reflection		
What worked well?		
What worked well		
What didn't work?		
What didn't work:		
Add at John Law 2		
What did we learn?		
What will we do next?		

The Plan-Do-Study-Act Cycle

Plan-Do-Study-Act (PDSA) cycles are great tools for monitoring and improving on-going work. The four phases of the PDSA cycle are elaborated on below. This tool is part planning and part evaluation, but I chose to include this tool in the planning section of the eBook because it is a well-established approach to continuous improvement processes as a whole.

Audience

PDSA cycles are great for any size group. The plans that they create also make stakeholder documents because they include a historical record of the growth of a system over time as well as key points of the evaluation.

Life Cycle

PDSA cycles are ongoing, perpetual cycles. They will live on until a systemic disruption (such as the introduction of a new program or protocol) interrupts them.

When to Use This Tool

Select the PDSA tool when you want to monitor and improve an existing system over time. PDSA cycles are not necessarily rapid improvement tools – they take time and attention. However; when deployed accurately and consistently monitored, they have been shown to generate long-term changes to systems within classrooms, schools, and districts. The PDSA tool also works well in concert with the other continuous improvement tools found in this eBook. For example, during the "plan" cycle, you may choose to deploy a 30-60-90 day plan or create a process map. Later, during the "study" cycle you may find it beneficial to distribute a Plus/Delta or complete a SWOT Analysis.

How to Use This Tool

PDSA cycles exist in four phases: plan, do, study, act. Each part of the cycle is worked on its own and leads into the next phase.

- 1. The first phase is the "plan" phase. During this phase, you will plan out the various steps that you need to take to achieve your goal. As I mentioned earlier, you may decide that you need to embed other planning tools into this phase.
- 2. Once your project is planned out, you enter the "do" phase. This is when you actually work your plan. Make sure you keep good records and collect lots of data along the way. You will need it when you enter the "study" phase.
- 3. During the "study" phase, you will check-in with your work to see if it is achieving the goals, you set out. Deeply analyze the data that you collected while implementing your project and determine what improvements need to be made. These improvements lead you into your "act" phase.
- 4. The "act" phase is when you take your newfound understanding of your system and act on the changes necessary to improve the system. You may decide that it is time to transition to a new phase of the project, abandon an existing component for something better, or that you need more time to collect the data you need to make good improvement decisions.

Once you have acted upon your improvement decisions, its time to plan again. This cycle continues until the system is disrupted or is no longer necessary. With each phase, you should continue to build your existing plan. Don't throw away your historical record – it will come in handy when you are three or four cycles down the road and a new teammate suggests a system improvement that you have already tried.

PDSA Cycle Planning Template

Project Overview		
Project Title:		
Cycle Start Date		
Cycle End Date		
Project Leader		
Team Members		
Phase One: Plan		
Task	Point Person	Deadline
Phase Two: Do		
Activity	Point Person	Product

PDSA Cycle Planning Template

Phase Three: Study			
Lesson Learned			Evidence
Phase Four: Act			
Responsive Change	Point	Person	Deadline
Prep for Next Cycle			
Cycle Start Date			
Cycle End Date			
Considerations for Next Cycle			

DMAIC

DMAIC stands for define, measure, analyze, improve, and control. It comes from the popular Six Sigma continuous improvement program and is a common tool in the world of industry. It is similar in structure to the PDSA model but is more focused on designing solutions to targeted problems rather than monitoring the health of large systems.

Audience

Small teams focused on designing targeted solutions to a problem.

Life Cycle

DMAIC planning is designed to end when your project is accomplished. In my experience, these cycles run anywhere from 3-6 months, but can run longer if you need to adjust your plan mid-stream.

When to Use This Tool

Select the DMAIC tools when you have a specific problem that requires a targeted solution. For example, DMAIC may be a useful tool when you need to develop an intervention to maintain decorum in the cafeteria at lunchtime.

How to Use This Tool

DMAIC planning is a five-step process that is designed to help you deeply understand your problem and act with intentionality.

- 1. Define The first step is to clearly define your problem. Make sure that everyone on your team understands your problem and would define it the same way.
- 2. Measure Measure the current efficacy of your system. The goal here is to gain a deep understanding of what is *currently* happening.
- 3. Analyze Analyze the current system to determine its defects. This is a good place to deploy some root cause analysis. You have to understand the defects before you can improve upon them.
- 4. Improve Implement a new process to replace the broken one. This is a good place to turn to the research literature and select a strategy that is evidence-based.
- 5. Control Once you have implemented your new process, you need to put some structures in place to ensure that it will continue to work well into the future. In education-land, we often call this phase monitoring.

While DMAIC ends with the implementation of control mechanisms, that doesn't mean that it can't also cycle. For example, if you implement an improvement but don't see a meaningful change, then you can cycle back to the measurement and analysis phases. Measure your improvement to understand the new system, analyze the new system, and improve upon it again.

If you find that you are only making small tweaks to your system each time, you may benefit from transitioning to a PDSA cycle. These cycles fit well within the implementation of a control phase and allow you to maintain your new system while continuing to improve it.

DMAIC Planning Template

Project Overview	
Project Title:	
Initial Review Date	
Follow Up Date	
Project Leader	
Team Members	
Define – What is the problem you ar	re trying to solve?
Measure – How will you measure th	e scope of the problem? How will you know if your efforts are working
, , , , , , , , , , , , , , , , , , , ,	

DMAIC Planning Template

Kanban Chart

Kanban charts come from the Kanban Method of workflow management. They are useful tools for monitoring multiple processes across various phases and can be used at the personal or organizational level to track workflow.

Audience

Kanban charts work great at all levels of your organization – from personal planning to agency wide process management.

Life Cycle

Kanban charts are valuable process management tools that can live as long as your processes.

When to Use This Tool

Select the Kanban chart when you need to track multiple projects across multiple stages. In the business community, these tools are often used to track the movement of a customer through the sales pipeline. In education, they can be useful when tracking repeated tasks, such as lesson planning processes or cyclical parent newsletters.

How to Use This Tool

Of all of the tools in this eBook, the Kanban chart is perhaps the most straight forward. Simply list your To-Do's in the To-Do column. As a task moves along its process, move it to the appropriate columns on the chart. Its as simple as that.

While I have included a template for the Kanban chart on the next page, I don't actually recommend using this paper template to track your work. You will be better served by creating an editable Kanban model somewhere else. Some organizations display their Kanban charts on large whiteboards, or even painted directly on the wall of the conference room and use sticky notes to move tasks around. Other organizations house their Kanban charts in a virtual environment, building them in word processing or spreadsheet software. If you get really into Kanban charts, there are tons of services online, like Monday.com or Asana.com, that provide virtual Kanban tools that can be integrated into other planning or alert systems.

Kanban Chart Template

Complete	
In Review	
In Progress	
То Do	
Back Log	

Process Mapping

Process mapping is a procedure that allows you to graphically represent the various components of a process. It is great for building new process or analyzing the components of an existing process.

Audience

Process mapping is normally performed by a small team and later shared with the larger organization.

Life Cycle

Process mapping is a one-time procedure that should be revisited at regular intervals to ensure that your process hasn't changed.

When to Use This Tool

Complete a process map when you are designing new processes or analyzing existing processes. The process mapping procedure allows you to document each of the elements in your process. Over time, they become great tools for training new employees or can act as "Control" mechanisms after you completed your DMAIC protocols.

How to Use This Tool

To build a process map, start by listing out the big steps of your process. Once you have those down, go back and dig deeper into each of the big steps. What are the small steps? What resources does each step require? Where is that information stored?

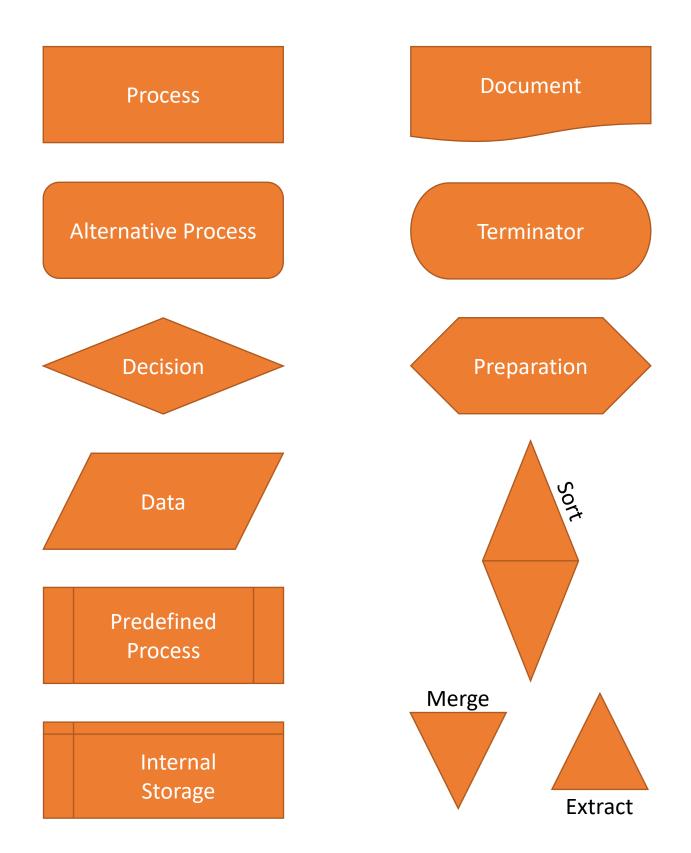
Once you have a good idea of the various components of your process map, it is time to build your graphic design. On the next page I have included a variety of standard shapes that are frequently included in process maps. You won't use all of them every time — and that is okay. A few key shapes to take note of include the "predefined process" shape, which symbolizes a standardized process within your organization that may be substituted into a larger process. The "internal storage" shape is also important as it represents your own information warehouses. Make sure to include the "data" shape anywhere that you may collect data and the "decision" shape anywhere that the user is required to make a decision.

Process maps are not always linear in nature and often include many feedback loops. The unique nature of process mapping means that I cannot provide you with a clear template here, but I have provided you with a process map sample based on the steps for creating and implementing a lesson plan. You can see that on page 17.

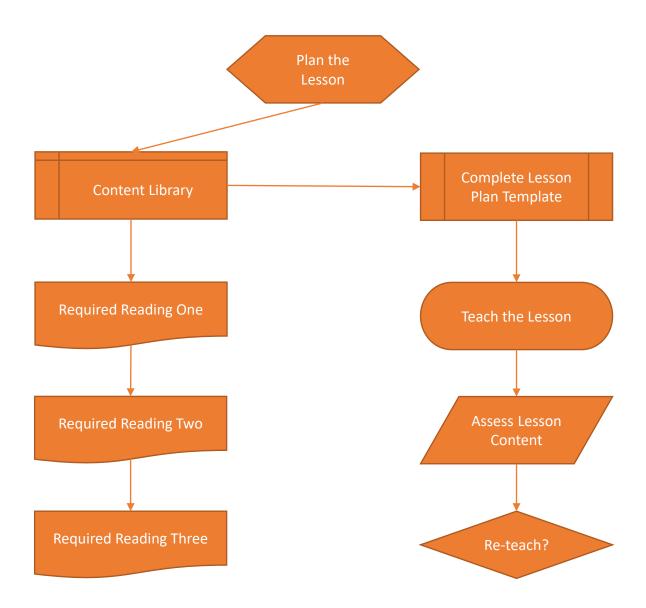
You can see on my model process map that I begin with a "preparation" shape to indicate that I need to prepare my lesson plan. My "preparation" shape leads me to my "internal storage" where I find several required readings. Next, I complete a "predefined process" by filling out my established lesson planning template. This leads me to teach the lesson, collect some data, and make a decision about remediation. I hope that this simple model demonstrates the power of process mapping and helps you to apply this concept to the more rigorous processes in your school.

There are many tools available to you when you are ready to actually build out your process map. These shapes have become standard in most word processing or presentation design software. I like to build process maps in Google Slides as it allows me to narrow in on sub-processes by creating new slides and is easily sharable with my colleagues.

Process Map Symbols

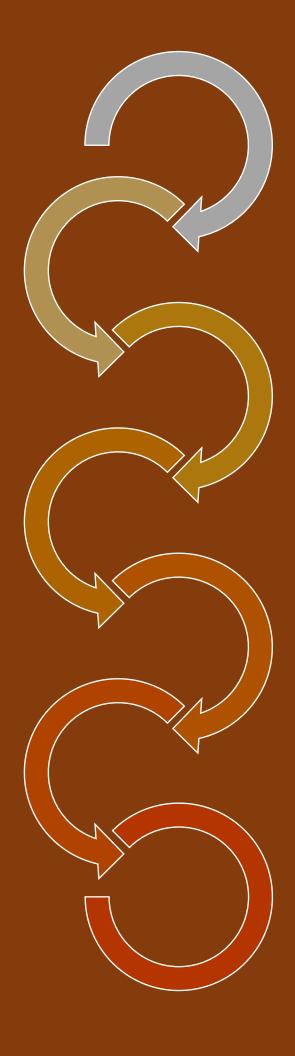


Process Map Sample – Lesson Delivery



Explanation

- First, you begin by planning your lesson. This is represented by a "preparation" shape.
- You must access content for your lesson. You retrieve this content from your *Content Library*. This is represented by an "internal storage" shape.
- In your Content Library you find three required readings. These are represented by "document" shapes.
- Having retrieved your content, you proceed to complete your pre-designed lesson plan template. This is represented by a "predefined process" shape.
- Next, you teach the lesson. This is a culminating event, so it is represented by a "terminator" shape.
- After you teach the lesson, you assess the lesson content. This is represented by a "data" shape.
- Finally, you must determine if you need to re-teach your content. This is represented by a "decision" shape.



Part Two Analysis Tools

Fishbone Diagram

A fishbone diagram is an analysis tool that helps you understand the cause-and-effect structure that is supporting your problem. Sometimes called an Ishikawa diagram, the fishbone diagram is a great tool when you need to understand the components that contribute to a problem.

Audience

Fishbone diagrams are great for small to medium sized teams working to understand a problem.

Life Cycle

Fishbone diagrams are single-use analytic tools. They can be completed in one meeting but may be revisited over time.

When to Use This Tool

Select the fishbone diagram when you need to pick apart the various components that contribute to a persistent problem. They are useful when your team starts spinning and can't get momentum during a problem solving meeting.

How to Use This Tool

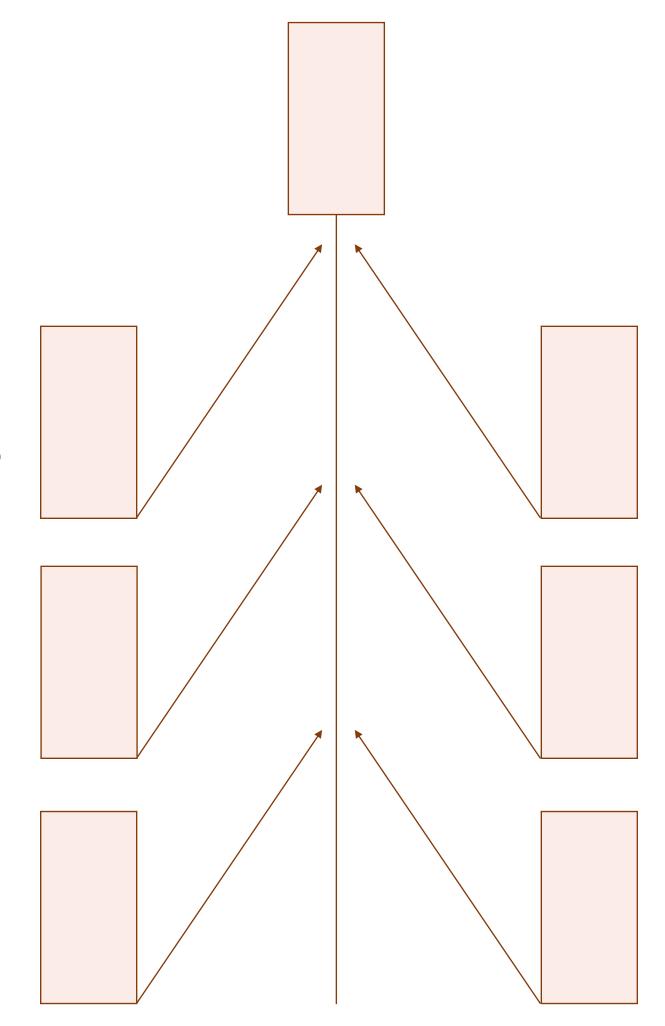
The template for a fishbone diagram can be found on the next page. Bet you can guess why it is called a fishbone diagram! The diagram consists of a series of boxes, connected by arrows to a main idea. With your team, agree on a brief problem statement and write that in the box on the far right hand side of the page – the fish's head.

Next, brainstorm the systems or components that you think contribute to the problem. Those go in the boxes at the ends of the spines. In a business setting, these six boxes are normally (1) methods, (2) machines, (3) people, (4) materials, (5) measurement, and (6) environment. These headings don't align great with most problems in education which is why I have left the boxes blank.

Take each of the six boxes one at a time. Have a discussion about the various problems that that system contributes to your larger problem. Talk about each problem and brainstorm some reasons why that problem exists. Document these notes on the spines of the diagram.

Once you complete the diagram, take a step back and look at it as a whole system. Where is the low hanging fruit? Are there problems that can be easily solved with a quick process or policy adjustment? If so, make the changes and cross them off the list. Do you have problems that are going to take more time to solve? Dedicate a future planning meeting to that problem and pick another tool, such as the 30-60-90 day planning tool, to tackle it.

Fishbone Diagram



Plus/Delta

The Plus/Delta is a simple, yet powerful tool to quickly and unemotionally solicit feedback from stakeholders.

Audience

The Plus/Delta works great with teams of all sizes. It is especially useful to help you understand the user experience, such as after a training session or parent night.

Life Cycle

The Plus/Delta is a quick and effective way to solicit feedback. It is a one-time tool that you can use over and over.

When to Use This Tool

Select the Plus/Delta tool when you need to solicit anonymous feedback from your stakeholders. It is quick, easy, and unemotional and will give you broad feedback on a variety of issues. It isn't the best tool if you are looking for targeted feedback on a specific element of an experience (such as the colors on a webpage). For that, traditional surveys are still best.

How to Use This Tool

The Plus/Delta tool is the simplest yet most powerful tool in your feedback arsenal. It consists of only two boxes. In the "Plus" box, participants are asked to comment on things that they liked about their experience. The idea is that we want to keep building upon things that are identified in the "Plus" box.

The "Delta" box is where participants list things that they think should change. The Greek letter Delta (depicted as a hollow triangle) is used in the science community to denote change. By asking your participants to suggest changes to an experience you are able to solicit their feedback about what things are not working as intended. Later, you can respond to those changes as you work to improve the experience in the future.

The Plus/Delta tool is a positive way to seek feedback. The framing of "things we should keep doing" and "things we should change" helps to eliminate some of the more hurtful comments that generally show up in anonymous feedback tools.

When you collect your Plus/Delta, you should make an effort to archive them so that they can be reflected on later. I like to distribute Plus/Delta's virtually so that I can download a single spreadsheet with all of the comments at the end. If you do them with a paper/pencil, you should scan them all into one file and store them somewhere safe.

Plus/Deltas work great at the end of any meeting. It allows your workers to provide feedback in a safe environment. If you do this, you should have someone type the anonymous feedback into the meeting minutes and then have a member of the management team respond to the deltas before sending the minutes out. This will help promote transparency and honest communication within your office.

Plus/Delta Template

Plus – What do you think is working?	
Delta – What do you think needs to change?	
Delta What do you think needs to change.	

SWOT Analysis

The SWOT analysis is a time tested analysis tool that helps you gain a deeper understanding of your organization's positioning. It forces you to consider the impact of positive and negative factors that come from both within and outside of your organization.

Audience

SWOT analysis works best when it is conducted by your continuous improvement leadership team. After it is finished, it can easily be transformed into a meaningful tool for stakeholder communication.

Life Cycle

SWOT analysis are single use tools. I recommend revisiting your SWOT analysis every year as a part of your annual needs assessment processes.

When to Use This Tool

Select the SWOT analysis tool when you want to gain a deeper understanding of your organization's positioning. It can help you understand the internal and external strengths and weaknesses of your organization and is a great way to jumpstart annual strategic planning sessions.

How to Use This Tool

A SWOT analysis has four components – strengths, weaknesses, opportunities, and threats. When you are ready to complete a SWOT analysis, your team should use brainstorming strategies to populate each of the four boxes. This will help you understand the current state of your organization.

As you can see in the SWOT analysis template on the next page, these four boxes are interconnected by second layer of titles. These titles help give the content in your box perspective. The columns indicate the moral polarization of the four boxes, with the first column focused on things that are helpful to your organization (strengths and opportunities) and the second column representing things that are harmful to your organization (weaknesses and threats). The rows have similar polar alignment. They help you to focus on things inside your organization (strengths and weaknesses) and outside of your organization (opportunities and threats).

During your work session, it can be helpful to periodically stop and remind your team of these dichotomies. The goal here is to make sure that each characteristic identified through your brainstorming process lands in the right box.

This is another tool where the template I provide is more of a model than a useable brainstorming tool. When leading this work, I like to ask everyone to complete the template on their own, transfer their notes to the sticky notes, then put them up on a bigger matrix that I have made out of chart paper. This makes sure that all of the ideas get out into the open.

Once you have completed your SWOT analysis, it is time to have a conversation with your team about what it means for your organization. Are you doing a good job of recognizing and supporting the strengths of your organization? Have you successfully leveraged all of the external growth opportunities available to you? What are you going to do to address the internal weaknesses you identified (hint: run through a PDSA cycle)? What about those external threats? Is there anything you can do to mitigate their impact?

SWOT Analysis Template

	Helpful	Harmful
	Strengths	Weaknesses
Internal		
	Opportunities	Threats
External		

Root Cause Analysis

Root Cause Analysis, sometimes called the Five Whys strategy, is a process designed to help you understand the true cause of a problem. If you don't understand the real problem, you cannot begin to devise a real solution!

Audience

Root Cause Analysis can be performed with teams of any size, although larger groups may need a little extra facilitation.

Life Cycle

Root Cause Analysis is a process that should be completed in a single meeting.

When to Use This Tool

Complete a Root Cause Analysis protocol when your team is beginning to work on a new problem. You want to do this early in the process to ensure that you are solving the real problem before you.

How to Use This Tool

Root Cause Analysis is deceptively simple. First, you identify the problem that you are facing. Then you ask yourself why that problem exists. Once you have identified a contributing factor, you ask yourself why that factor exists. Wash, rinse, and repeat. Here is an example:

Problem: Nobody ever shows up to family night.

Why? – Because families don't want to come to the school.

Why? – Because it can be difficult to get away from other responsibilities.

Why? – Because families lack appropriate childcare for other children.

Why? – Because families cannot afford childcare in the evening.

Why? – Because we serve a historically underserved population.

Solution – We will offer free childcare at our next family night.

You can see that this process helps you to home in on real problems so that you can create more targeted solutions. What if you just assumed that families don't want to come to the school and your conversation stopped there? You may have offered additional enticements, such as a chili supper, at your next family night. The enticement probably wouldn't have worked because the cause didn't have anything to do with dinner. It was childcare that they really needed.

You may decide that there are multiple why's in the first or second step. That is okay. Repeat the process multiple times to ensure that you have thought everything through all the way.

Root Cause Analysis Template

Muda, Mura, Muri

Muda, Mura, Muri comes to us from the Toyota Production System and is a method designed to help us understand waste in our systems. The need to understand waste is obvious in an industrial context – waste equals lost revenue – but it is equally important to examine waste in our school systems.

Audience

Muda, Mura, Muri works best when completed by a small team; however, I recommend using other tools, like the Plus/Delta tool, to solicit feedback about waste from a large number of stakeholders.

Life Cycle

Muda, Mura, Muri analysis can take some time to complete. It will likely take a couple of meetings to solicit necessary feedback and complete the analysis task.

When to Use This Tool

Complete a Muda, Mura, Muri protocol when your team is stuck with a system that is feeling a bit sluggish. These work great during the "Study" phase of a Plan-Do-Study-Act cycle.

How to Use This Tool

Muda, Mura, Muri analysis consists of simply identifying three types of organizational waste.

- Muda refers to activities that do not add value to the organization. In industry, Muda may occur
 when a factory produces more car parts than were ordered by the customer. In education,
 Muda may show itself as excessive whole class bathroom breaks or holding weekly staff
 meetings just because you think you should.
- Mura occurs when the services provided by your organization are uneven. Unevenness and inconsistency are enemies of continuous improvement. In schools, Mura may be created when grade level standards are interpreted differently by members of the same team or special education enrichments don't align with classroom pacing.
- Muri exists when processes are unnecessarily difficult. In my experience, lesson planning templates often fall into this category. While lesson planning templates are important, over time they can become unnecessarily cumbersome and time consuming leading to wasted time and lowered morale.

As I mentioned earlier, a Muda, Mura, Muri analysis begins by soliciting input from stakeholders. It is unlikely that the leadership team is able to clearly see the different types of waste occurring in their school. If a principal thought a lesson planning template was wasteful, they probably wouldn't have implemented it. Without input from their teachers, they may not be able to see that they have created Muri by accident.

One common pitfall of Muda, Mura, Muri analysis is that leaders act too quickly when eliminating waste. While you certainly want to address each of the issues uncovered during your work, you don't want to simply throw away all of your structures and processes. That will only create more waste. Instead, take a look at each issue and build a thoughtful plan to eliminate waste.

Muda, Mura, Muri Template

Muda – Process that do not add value.
Mura – Unevenness in service delivery.
Muri – Tasks that create undue burden.



For more information about how you can use data and research to drive continuous improvement in your school or district, please visit:

www.matthewbcourtney.com