

# Sample Agency Lean Academy Charter Document

Subject	Tuition Reimbursement Process		Version Date: May 2, 2016
Background	<p>Subject to the availability of funds, the Agency provides permanent and exempt employees up to \$1,800 in tuition reimbursement per school year for qualified courses. Employees must submit required information on the Tuition Reimbursement Request Form and obtain the required approvals for reimbursement before registering for the class. Currently this is a multi-step process that begins electronically, then must be printed out and transferred between departments for physical signatures. Requests are tracked on two separate spreadsheets in two departments. Three different staff members end up with a physical copy of the form and these are stored in hard copy. Delays are not uncommon as signatures are awaited and tracking of requests is not automatic. It is a cumbersome process, and can be confusing to the employee making the request. Costs of the current process include time, delays, stress, duplication of effort and storage space.</p>		
Targets	<ul style="list-style-type: none"> <li>• Decreased time from request to approvals.</li> <li>• Single, automatic tracking form.</li> <li>• Completely online process, including electronic signatures.</li> <li>• Records stored electronically.</li> <li>• Everyone involved in the approval process should have access to all forms at all times.</li> </ul>		
Boundaries	<ul style="list-style-type: none"> <li>• Must include all current approving personnel and preserve all steps in the process.</li> <li>• Secure environment with restricted access for requests once in the process (in Sharepoint).</li> <li>• Automatic notifications and tracking.</li> <li>• Method of verification of who submitted each step.</li> </ul>		
Timeline	<p>Leadership Prep: 3/25/16, 3/30/16      Team Prep: 4/6/16, 4/29/16      Kaizen: 5/10/16 – 5/14/16 &amp; 30/60/90</p>		
The Team	<p>Sponsor: Marie Dean and Janelle Rogers  Facilitator: Debra Hentz, Lean Specialist, Local Government Performance Center, SAO  Team Go-To Person: Marisa Smith and Charleen Peters  Team members: Marwan Athens, Heather Brown</p> <p>On-Call members: Huong Tran, Daniel Waterton</p>		<p>Stakeholders:</p> <p>Staff  Human Resources  Financial Services</p> 