



Operational Excellence for Education

ASSOCIATE LEVEL | FULL-DAY TRAINING PROGRAM

A hands-on, practical day designed to build the operational confidence and improvement capability of school business professionals.

Phase 1 — Understand the System

Build a shared language for operational thinking and begin to see your own systems with fresh eyes.

8:30 AM	Welcome, Introductions & Framing the Day Set the tone for the day and capture the real operational challenges your team is navigating. The frustrations you bring into this room become the thread that runs through everything that follows. <i>Key topics: Improvement mindset, Operational awareness, Challenge mapping</i>
9:00 AM	Understanding Improvement Explore what it actually means to define an improvement well. You will leave this section with a practical tool for writing improvement statements that are specific, measurable, and grounded in real outcomes. <i>Key topics: Defining improvement, Measurable outcomes, Improvement Statement tool</i>
9:35 AM	Systems Exercise Experience the gap between how organizations see themselves and how the people they serve experience them. This activity uses a familiar real-world scenario to make systems thinking tangible and immediately recognizable. <i>Key topics: Systems thinking, Multiple perspectives, Experience design</i>
10:15 AM	Morning Break
10:30 AM	Failure Demand Give a name to the hidden work that accumulates when systems fail to meet needs the first time. Participants identify real examples from their own organizations and begin to see failure demand as a signal pointing back at a fixable process — not just a workload problem. <i>Key topics: Value demand vs. failure demand, System failure as signal, Cost of repeat contact</i>
11:00 AM	Working Across the Organization Most operational failures happen at the seams between departments, not within them. Participants examine a real cross-departmental breakdown from their own experience, then explore a practical framework for designing better coordination. <i>Key topics: Cross-functional coordination, 4S Model, Handoff failure</i>
11:35 AM	Lunch 45 minutes

Phase 2 — Experience the System

Step inside a system under pressure and discover firsthand how design shapes everything.

- 12:25 PM** **Production Simulation**
Work in teams through a structured, timed production exercise. Real data is collected and used in the debrief. This is one of the most energizing parts of the day.
Key topics: Batch processing vs. flow, Bottlenecks, System constraints, Improvement rounds
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- 1:25 PM** **Simulation Debrief**
Unpack what just happened.
Key topics: System design, Bottlenecks, Improvement through redesign
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- 1:45 PM** **OpEx Framework & Lean Principles**
A focused introduction to the three pillars of Operational Excellence and the five Lean principles.
Key topics: Operational management, Work organization, Process improvement, Lean principles
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- 1:55 PM** **Afternoon Break**

Phase 3 — Diagnose the System

Develop a practical lens for finding the waste that is hiding in plain sight.

- 2:10 PM** **Recognizing Waste in Systems**
Two complementary frameworks give you a structured way to identify waste across any operational process. Both are applied immediately to examples from the simulation and from your own organizations, through an educational lens.
Key topics: TIMWOOD DEMICOD Waste in education contexts

Phase 4 — Improve the System

Apply practical improvement tools to the real challenges you identified throughout the day.

- 2:35 PM** **Improving Systems with SECAR**
A clear, actionable decision framework for working through the waste you have just identified. Some actions are immediate and low-risk. Others require more planning. Participants consider where each applies in their own context.
Key topics: Simplify, Eliminate, Combine, Automate, Relocate
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- 2:55 PM** **Variation & Standard Work**
When different people handle the same process differently, the people being served experience unpredictable results. This section makes inconsistency visible through a live exercise, then introduces standard work as the natural and logical solution.
Key topics: Uncontrolled variation, Standard work, Consistent outcomes

Phase 5 — Stabilize the System

Leave with a specific, written improvement commitment rooted in your own organization.

- 3:15 PM** **Improvement Statement Work**
Return to the challenges you captured at the start of the day. Apply the Improvement Statement tool to one of them. You will leave with something written, specific, and yours — not a general intention, but a real commitment to act on.
Key topics: Current state to desired state, Measurable outcomes, Personal improvement commitment
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- 3:30 PM** **Reflection & Close**
A brief facilitated reflection draws the arc from Phase 1 through Phase 5. Learn about the Associate Level certification pathway and what comes next at the Lead and Strategic levels.
Key topics: Post-training survey, Associate certification, Lead and Strategic levels