

ALL LIVES HAVE EQUAL VALUE

**Lean in Philanthropy:**  
An Innovative Application of Lean in a Non-Traditional Setting

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# Who we are



2000

- ~3 strategies
- 150 employees



2006



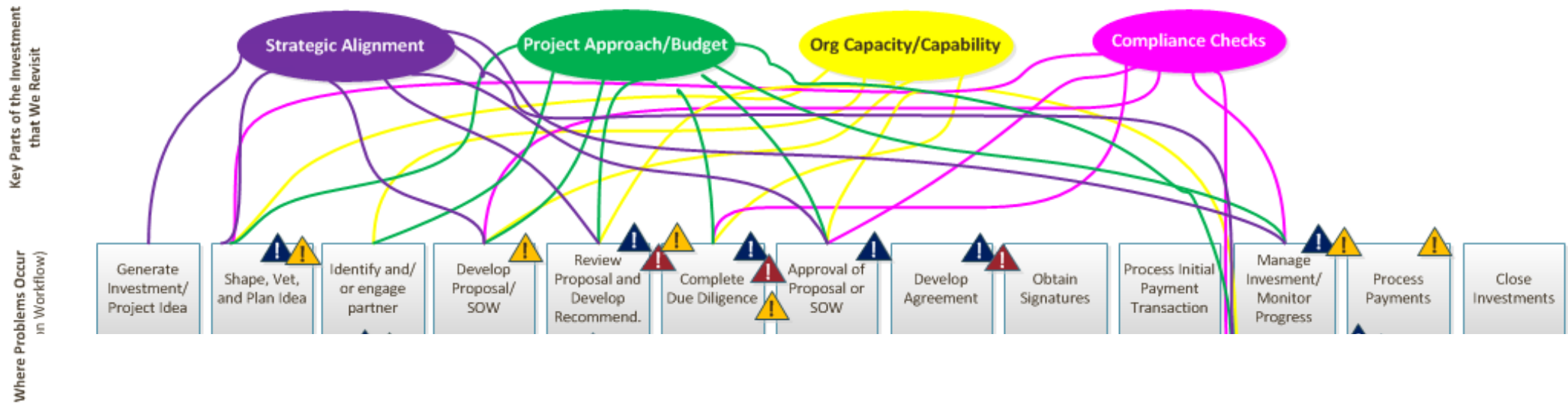
2012

- 27 strategies
- 1,000 employees

# What the problem was

Rapid growth led to operational  
**inefficiencies**, team **silos** and  
unnecessary **rework** on investments

# Why we did this work



- ! Decision-making unclear
- ! Late engagement
- ! Processes not right-sized

# What we worked toward



Eliminate  
non value-add  
activities



Formalize  
decision-making  
process



Give staff  
time back  
to focus on  
their work

# Who we involved

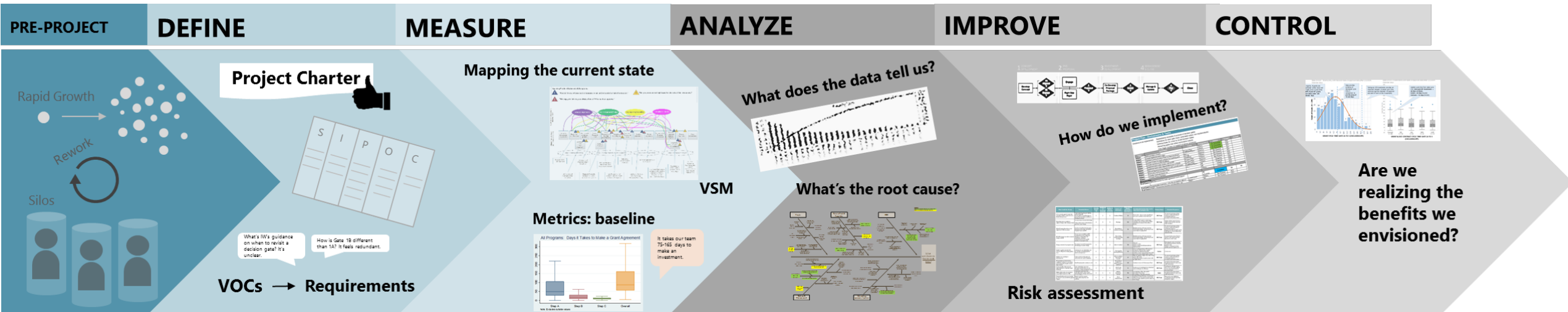


# Who we involved



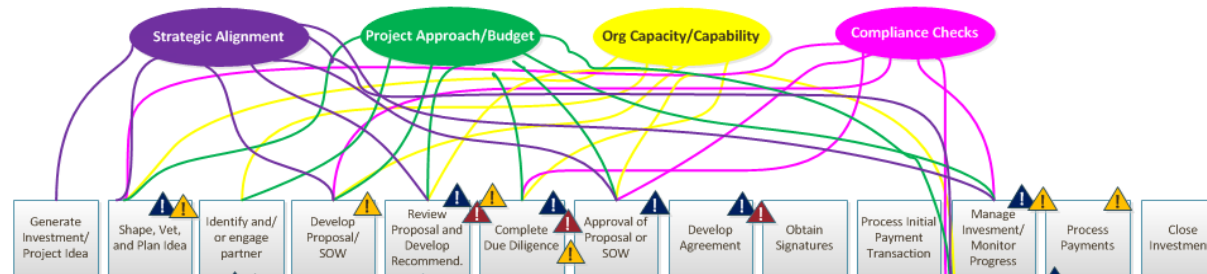
# How we approached the work

## Lean Six Sigma DMAIC





# Where we landed

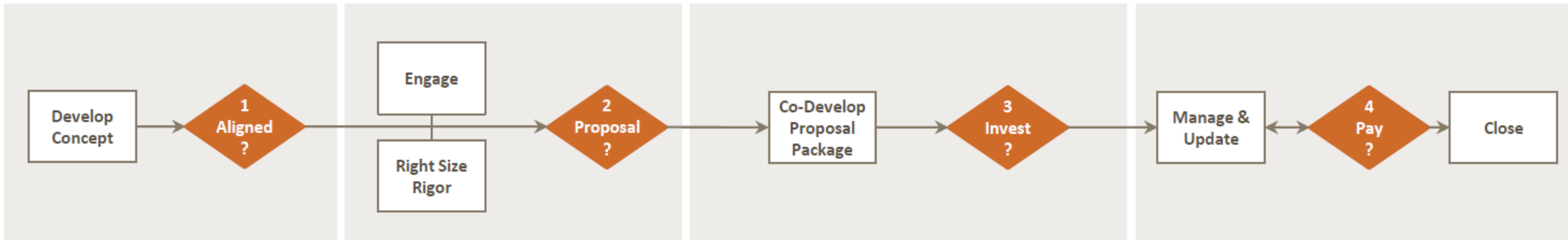


## 1 CONCEPT DEVELOPMENT

## 2 PRE-PROPOSAL

## 3 INVESTMENT DEVELOPMENT

## 4 MANAGEMENT & CLOSE



# What the system looks like



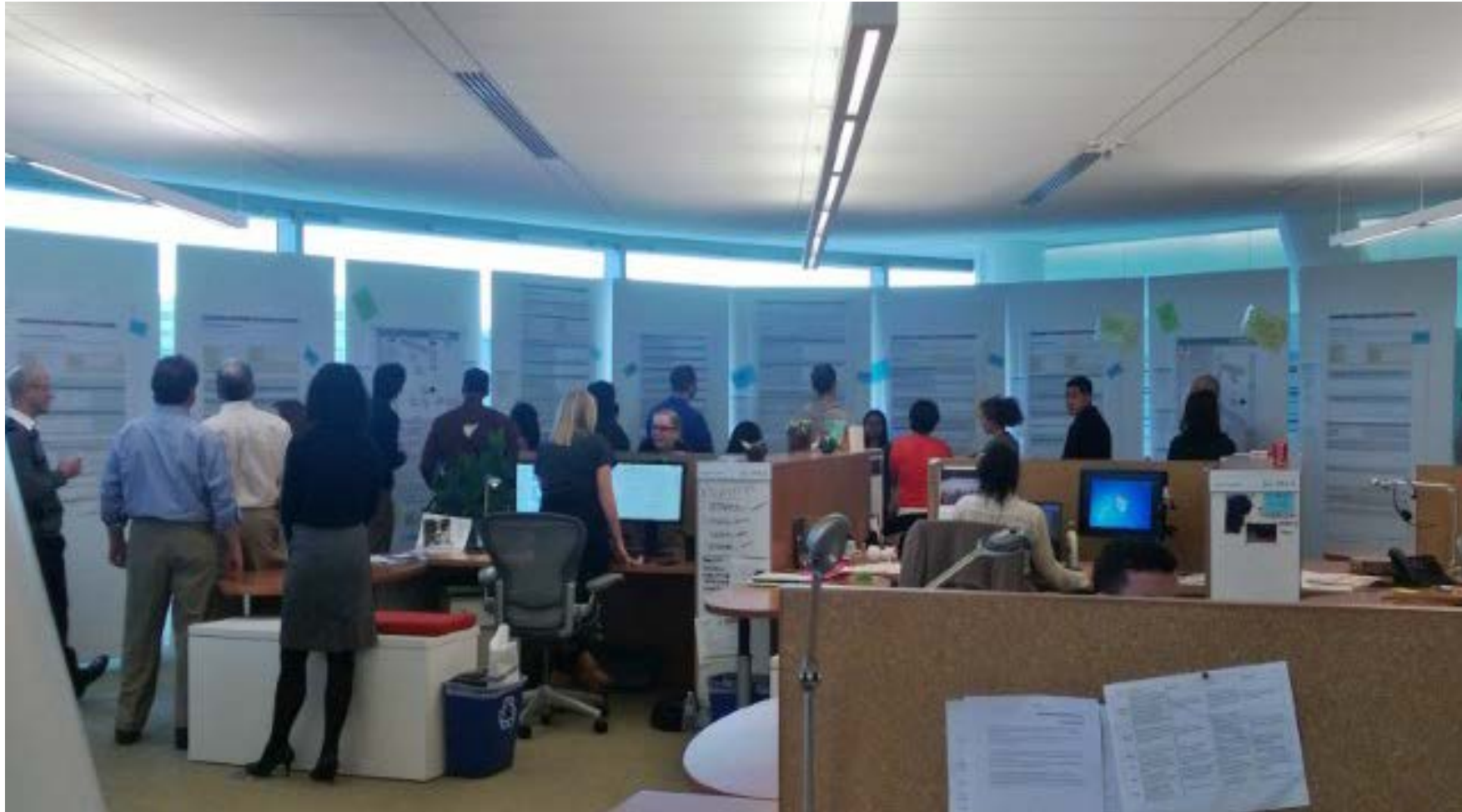
# Training & Implementation Support



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# Training & Implementation Support

The Commons  
Fast People | Fast Places | Fast Forms, Policies & Guidelines

All Sites

Friday, September 12

About the Foundation | Core Services | Program Support

Operations | Services | Topics | Teams | Offices | Communities | Sites | Staff

Site Actions

View All Site Content

Libraries

**IW Home**

Grant and DCE Contract

- Conference Support
- General Operating Support
- Supplemental Amendment
- Light Touch
- REP
- Emergency Relief
- Family Interest
- Product Dev. (GH)
- Table Sponsorships
- FBI

P&A Contract

- P&A REP

Gateway

- Working Offline

The Commons > Operations > Investment Workflow

## INVESTMENT WORKFLOW

### Overview

Investment Workflow is a process and set of scalable tools used foundation-wide to support the movement of investments through four phases of the lifecycle: Concept Development, Pre-Proposal, Investment Development, Management and Close.

**Need Support?**

Looking for Gateway User Guides?

- Scalability & Lower Risk One-Pager
- Ongoing Continuous Improvement Summary

**Best Practices Implementing Investment Workflow**

Click here for examples of how to successfully implement IW!

Best Practice!

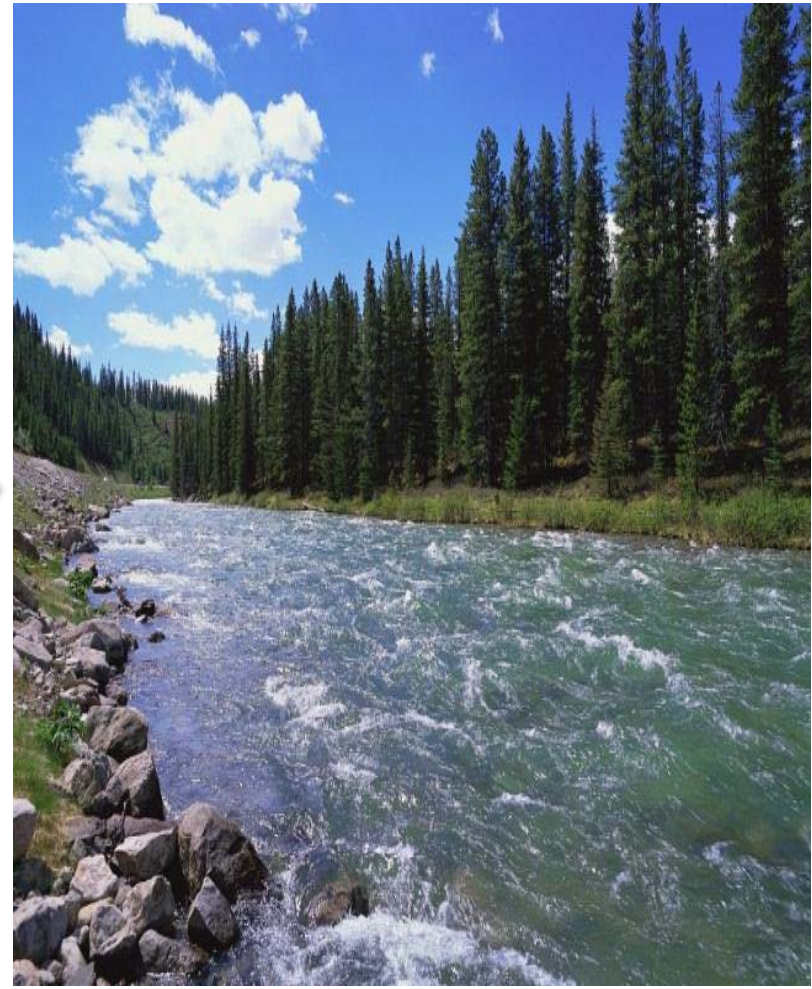
### Investments By Team

Name
Program : Communications (1)
Program : GD (13)
Program : GH (11)
Program : GPA (10)
Program : Operations (2)
Program : P&A Contracts Pilot (2)
Program : USP (7)

INVESTMENT WORKFLOW CALENDAR

New | Actions | Settings

# Continuous Improvement

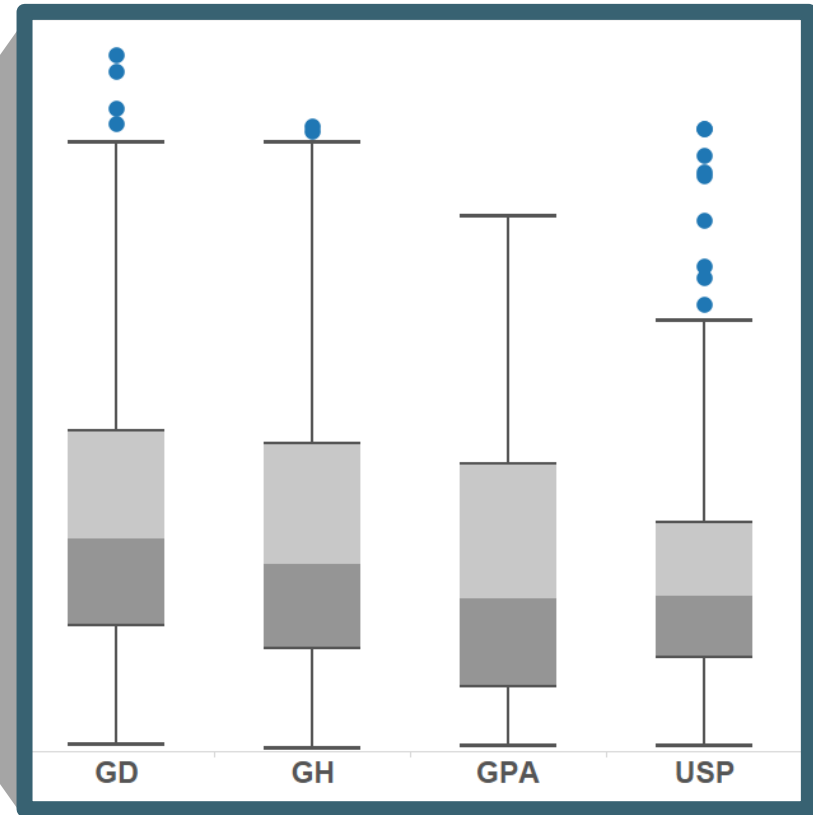
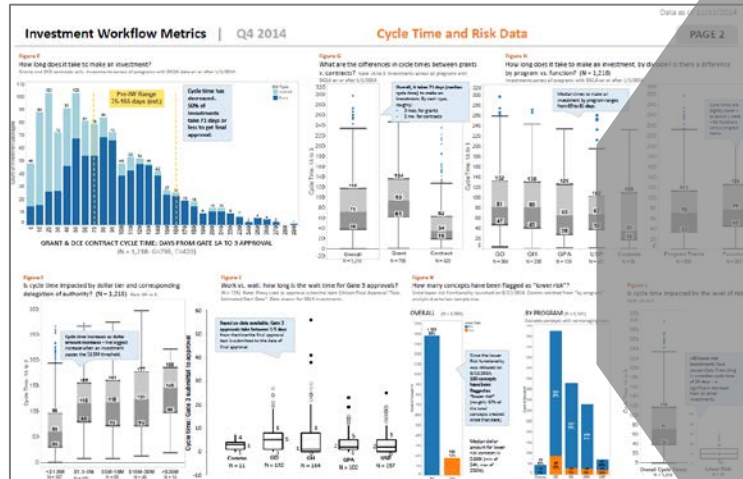


# Continuous Improvement





# What we measure



# Biggest Changes

**Standardization**

**Right-Sized Rigor**

**Process  
Ownership**

**Continuous  
Improvement**

# Where to From Here?

- Challenges
- Intersections
- Evolutions
- Behaviors and Culture

# Our Top Five List

**\*BONUS:** KEEP IT SIMPLE! (and then simplify it...)

1. Change management should start on Day 1 and happen **every day**.
  2. Secure **leadership engagement** (more than simple buy-in).
  3. Build with **metrics** in mind so you can track progress and adjust.
  4. Build and test the process first, **before you build a system**.
  5. A set of **core design principles** can help you stay on track.
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