

Strategic Lean Project Report



For Reporting Period: January 1, 2015, through June 30, 2015

I. General Information:

Lead agency name: Office of Financial Management

Partner agencies:

Improvement project title: HR Director's Public Meeting Internal Preparation Process

Date improvement project was initiated: 2/10/2015

Project type: New Project

Project is directly connected to:

Results Washington performance measure

Agency Strategic Plan

Other

If applicable, specify the alignment:

Dynamic Leadership – OFM capacity is available to support timely, data-driven decision-making
Communication and Trust – We are a trusted partner in all interactions because we use clear, open and honest communications.

Report reviewed and approved by: Tracy Guerin

II. Project Summary:

The purpose of this project is to streamline internal preparation documentation and processes that have ballooned and are undocumented due to multiple organizational and statute changes that have occurred over the last five years. As of this report, the Office of Financial Management has identified and is implementing the following improvements in the HR Director's Public Meeting Internal Preparation Process.

III. Project Details:

Identify the problem:

- Staff (7 analysts) must complete a form specific to the agency action requested. Inconsistent formatting between the forms and terminology used by the staff lead to inaccurate information posted publically and in the electronic systems.
- There are approximately 4 hours spent producing a verbatim transcript for each meeting that duplicates the recording of the meeting.
- There are multiple documents that make up a request 'package' to be taken to the HR Director's Public Meeting for official adoption per WAC. These documents have specific individual retention and archiving requirements, and are needed for research for future classification and compensation actions. These documents are saved in four different electronic systems and multiple file structures.

Strategic Lean Project Report



Problem statement:

Currently:

- Form confusion and inconsistent information result in inaccurate notification to public of proposed changes approximately 35% of the time. Requires official notification to be revised and reposted. Target is total elimination of inaccurate information and redundant work by 12/31/2015.
- 4 + 4 = 8 hours every 3 months are spent on creating and storing duplicate transcript documentation compared to our target of 0 hours, which we want to reach by 12/31/2015.
- Time is spent searching through multiple electronic systems and hardcopy file folders to locate final, approved versions of documentation. This equates to hours of staff analyst time spent trying to locate needed information.

Improvement description:

- Reduction of the number of versions of forms, staff can easily identify appropriate form and complete consistently. Staff responsible for logging information from the form into the appropriate systems have consistent and accurate information.
- Eliminate producing the verbatim transcript, saving 4 hours of staff time per meeting.
- Reducing document storage locations by half and implementing naming conventions and reference tools to support accessibility and identification of the documentation to result in time savings for staff analyst. Enhanced compliance with retention and archiving requirements.

Customer involvement:

Involved multiple units in the workgroup to make improvements and checked with additional internal stakeholders to test ideas and countermeasures. Also, considered agency need to have information available and reducing the non-value added documentation positively impacts the time analysts can spend with customers as well as reduces time spent searching for files when helping customers.

IV. Project Details:

Improved process as measured by: <i>(Click those that apply)</i>	Specific results achieved: <i>(Complete the narrative boxes below)</i>	Total Impact: <i>(Actuals; Current Reporting Period)</i>	Results status:
<input type="checkbox"/> Safety			
<input type="checkbox"/> Cost			Preliminary
<input checked="" type="checkbox"/> Quality	Increased accuracy in notification to public from 35% error rate due to inconsistent information to 0% error rate by 12/31/2015.		Preliminary
<input checked="" type="checkbox"/> Time	Decreased Time creating and searching for files from 4 electronic systems to 2 core systems with established standards by 12/31/2015.		Preliminary

Strategic Lean Project Report



<input type="checkbox"/> Customer Satisfaction		<input type="checkbox"/> N/A (or)	
<input checked="" type="checkbox"/> Employee Engagement	Increased employee knowledge, tools and resources to manage work from employee frustration and making up their own process to established team standards.	<input type="checkbox"/> N/A (or)	Preliminary

V. Contact information:

Name: Angie Hogenson

e-mail: angie.hogenson@ofm.wa.gov

Phone number: 360-407-4111

Strategic Lean Project Report



For Reporting Period: January 1, 2015, through June 30, 2015

VI. General Information:

Lead agency name: Office of Financial Management

Partner agencies:

Improvement project title: HR Director's Public Meeting Internal Preparation Process

Date improvement project was initiated: 2/10/2015

Project type: New Project

Project is directly connected to:

- Results Washington performance measure
- Agency Strategic Plan

If applicable, specify the alignment:

Dynamic Leadership – OFM capacity is available to support timely, data-driven decision-making.
Communication and Trust – We are a trusted partner in all interactions because we use clear, open and honest communications.

Other

Report reviewed and approved by: Tracy Guerin

VII. Project Summary:

The purpose of this project is to streamline internal preparation documentation and processes that have ballooned and are undocumented due to multiple organizational and statute changes that have occurred over the last five years. As of this report, the Office of Financial Management has identified and is implementing the following improvements in the HR Director's Public Meeting Internal Preparation Process.

VIII. Project Details:

Identify the problem:

- Staff (7 analysts) must complete a form specific to the agency action requested. Inconsistent formatting between the forms and terminology used by the staff lead to inaccurate information posted publically and in the electronic systems.
- There are approximately 4 hours spent producing a verbatim transcript for each meeting that duplicates the recording of the meeting.
- There are multiple documents that make up a request 'package' to be taken to the HR Director's Public Meeting for official adoption per WAC. These documents have specific individual retention and archiving requirements, and are needed for research for future classification and compensation actions. These documents are saved in four different electronic systems and multiple file structures.

Strategic Lean Project Report



Problem statement:

Currently:

- Form confusion and inconsistent information result in inaccurate notification to public of proposed changes approximately 35% of the time. Requires official notification to be revised and reposted. Target is total elimination of inaccurate information and redundant work by 12/31/2015.
- 4 + 4 = 8 hours every 3 months are spent on creating and storing duplicate transcript documentation compared to our target of 0 hours, which we want to reach by 12/31/2015.
- Time is spent searching through multiple electronic systems and hardcopy file folders to locate final, approved versions of documentation. This equates to hours of staff analyst time spent trying to locate needed information.
- Reduction of the number of versions of forms, staff can easily identify appropriate form and complete consistently. Staff responsible for logging information from the form into the appropriate systems have consistent and accurate information.
- Eliminate producing the verbatim transcript, saving 4 hours of staff time per meeting.
- Reducing document storage locations by half and implementing naming conventions and reference tools to support accessibility and identification of the documentation to result in time savings for staff analyst. Enhanced compliance with retention and archiving requirements.

Improvement description:

Customer involvement:

Involved multiple units in the workgroup to make improvements and checked with additional internal stakeholders to test ideas and countermeasures. Also, considered agency need to have information available and reducing the non-value added documentation positively impacts the time analysts can spend with customers as well as reduces time spent searching for files when helping customers.

IX. Project Details:

Improved process as measured by: <i>(Click those that apply)</i>	Specific results achieved: <i>(Complete the narrative boxes below)</i>	Total Impact: <i>(Actuals; Current Reporting Period)</i>	Results status:
<input type="checkbox"/> Safety			
<input type="checkbox"/> Cost			Preliminary
<input checked="" type="checkbox"/> Quality	Increased accuracy in notification to public from 35% error rate due to inconsistent information to 0% error rate by 12/31/2015.		Preliminary
<input checked="" type="checkbox"/> Time	Decreased Time creating and searching for files from 4 electronic systems to 2 core systems with established standards by 12/31/2015.		Preliminary

Strategic Lean Project Report



<input type="checkbox"/> Customer Satisfaction		<input type="checkbox"/> N/A (or)	
<input checked="" type="checkbox"/> Employee Engagement	Increased employee knowledge, tools, and resources to manage work from employee frustration and making up their own process to established team standards.	<input type="checkbox"/> N/A (or)	Preliminary

X. Contact information:

Name: Angie Hogenson

e-mail: angie.hogenson@ofm.wa.gov

Phone number: 360-407-4111