

Detailed Lean Improvement Project Report

For the June 1, 2014, through December 31, 2014, reporting period



Agency name:

Puget Sound Partnership

Improvement project title:

PSP Contract Management Process

Date improvement project initiated:

Charter finalized on 3/25/2014; one-day forum held on 4/18/2014

Process updated 9-15-14. Staff involved in contract management were convened to identify priority actions from the improvement plan and detailed implementation steps.

Summary:

The Puget Sound Partnership used a value stream map to develop process improvements in the agency’s contract management process. We expect that this will result in:

- Greater employee satisfaction with the new process;
- Greater contractor satisfaction with the new process;
- Improved quality in contract deliverables;
- Better accountability to Washington State citizens.

Details:

Description of the problem:

Description of the improvement:

Note: we used our kaizen bursts to address both of these questions.

Problem to be solved	Action Needed
Invoices, deliverables, and progress reports are all coming to different people. Who gets what varies from contract to contract because there's no clear process.	Need a common electronic repository for incoming invoices, progress reports, and deliverables. Provide examples of what this would look like. Include amendments.
We have a hard copy general ledger; it's slow and cumbersome and potential for human error is high.	Electronic/fiscal record of contact maximum considerations.
Progress reports can show no progress.	Develop criteria and checklist for progress report.
Project managers do not know what they need to consistently track, and can lose track of what is due.	Develop & provide monitoring tools that fiscal can access
How do we track intangible deliverables?	Create a mechanism for tracking intangibles.

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We have no formal closeout process for confirming that we have everything that we need to end the work, and document the work.	Develop a formal close-out process & checklist.
Was the contractor good?	Develop a final recommendation on whether to use that contractor again or not.
We have no final report template, despite requiring a final report from contractors in the contract.	Create a final report template
No formal procedures.	Develop a procedures manual.
No training.	Develop one or more trainings: new contract management process, scope of work writing, quality.
Convey changes to our contractors.	Share changes as needed.

Specific results achieved: Staff identified the following priorities: a) need for formal procedures; b) training; and c) formal closeout process as the highest priority first actions.

- **Procedures.** Finance staff are in the process of drafting procedures to cover each of the steps in the contract management process. These will be reviewed by a staff subcommittee, referred to upper management and then finalized by March 2015.
- **Training.** Training will not occur until the procedures are finalized.
- **Closeout.** Finance and performance management staff convened a subgroup to design a closeout process. The first step was to create an electronic repository for document. A cloud site was identified. All project deliverables for 2013-2014 contracts were moved to the site. Staff also created a form for staff that included all of the key contract information, anticipated deliverables, status of deliverables, comments on progress. The form allowed for placement of deliverables in cloud site as attachments.

The form (electronic Smartsheet) was so successful that it will also be used for another major project that involves tracking all ecosystem recovery projects in Puget Sound funded using either state funds or EPA grant funds.

PSP staff will continue to address each of the remaining tasks in the improvement plan during the first half of 2015.

How we involved customers or stakeholders in this effort:

The initial process was a traditional Lean forum that involved representatives from each of the substantive teams in the agency. The subsequent steps involved convening of task

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subgroups to develop more detailed implementation plans for each of the Lean recommendations.

The cloud and Smartsheet tools were selected based upon feedback from representatives of each of the state natural resource agencies that receive grant funds from EPA for Puget Sound recovery. That group held a series of meetings to test out products, devise reporting categories and populate the site. This group used the repository and Smartsheet developed by PSP as a test site for its contracts. The group then decided that the project could be expanded to be multi-purpose.

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