

Strategic Lean Project Report



For Reporting Period: January 1, 2016 through June 30, 2016

I. General Information:

Lead agency name: Office of Financial Management

Improvement project title: Fiscal Impact Statement for Class & Comp Proposals Process

Date improvement project was initiated: 4/15/2015

Project type: New Project

Project is directly connected to:

If applicable, specify the alignment:

Agency Strategic Plan

Dynamic Leadership – We provide vision, direction and support for statewide initiatives and efforts internal for OFM.

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, Deputy Director

II. Project Summary:

The Office of Financial Management improved the fiscal impact statement (FIS) for class & comp proposals process, involving both the Budget and State HR divisions, resulting in reducing the time associated with processing requests that have funding implications., resulting in reduction in time spent processing non-viable requests by both divisions. The process requires information both the business need and the budget implications.

III. Project Details:

Identify the problem:

A significant amount of work in reviewing and validating business needs is performed early in the process, only to have some of the request denied due to financial reasons. The form does not contain all the information necessary to make a recommendation on the financial component. It's also unclear as to what the review actually means. Meetings to determine a final recommendation do not seem very productive. The majority of information reviewed at the meeting is prepared ahead of time, but questions or clarifications are not asked until the meeting is held.

Problem statement:

Currently, staff spends several hours reviewing information and preparing recommendations on requests that may not have budget resources to be implemented. The goal is to reduce time spent processing requests which agency cannot absorb and prevent doing evaluation of the request when not needed.

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Improvement description: The improvement method the team is utilizing is ongoing g-PDCA cycles in priority areas needing improvement as identified through a Value Stream Mapping workshop in early 2016 and ongoing coaching of process owners to keep the g-PDCA cycles moving forward and enabling leadership to coach the team to make further adjustments.

In cases where it is determined that the agency cannot absorb, and the change is denied, the new process saves significant time because the HR analyst is notified that budget denies the request significantly earlier than would have happened under the old process, thus saving the HR analyst from doing an evaluation of the request when that was not needed.

Customer involvement: Customers get through the process with less rework and analysts can spend more time helping customers with additional questions and requests. Customers were used in the testing cycle of the new form and the new process of getting information up front.

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 checked="" type="checkbox"/> Time	In cases where it is determined that the agency cannot absorb, and the change is denied, the new process saves significant time because the HR analyst is notified that budget denies the request significantly earlier than would have happened under the old process, thus saving the HR analyst from doing an evaluation of the request when that was not needed.		Preliminary

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